

REVIEW OF NSW Arts & Cultural Sector Service Needs

FINAL REPORT & RECOMMENDATIONS



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NSW Arts and Cultural Sector Service Needs Review

1. Executive Summary

The Service Needs Review aimed to establish the existing service needs of the NSW arts and cultural sector, identify any gaps in services currently being offered and inform future support for services to the arts and cultural sector across NSW.

The Review confirmed that service organisations provide highly valued benefits to the arts and cultural sector, audiences and Create NSW. Major findings of the Review include:

- Artists and arts organisations view arts sector services provided by NSW service organisations positively and express a strong need for a wide range of professional development and capacity-building services.
- Producer and presenter organisations have extended their remit to support artists through service activities and conversely, traditional service organisations recognise opportunities to leverage the talents of their members through directly presenting and even supporting the production of artistic work.
- Service organisations emphasised resource constraints, including staff, funding and infrastructure and reported that this made it difficult to meet the existing demand for the sector's service needs.
- Service organisations reported a strong need and desire for their core business to provide greater levels of support to the NSW Government's priority populations, including:
 - First Nations artists and audiences
 - Artists and audiences with disability
 - Artists and audiences in priority regions: Western Sydney and regional NSW.
- The Report recommends six Priority Service Areas for action which incorporate sector needs identified through the review process:
 - Digital Resources – development of more high-quality web-based digital resource material and services
 - Practical Facilitation – increasing capacity to assist artists and arts organisations to manage, produce and market their work
 - Careers Development - enhancing connections to promote collaboration on career development pathways, mentoring, entrepreneurship and business development for NSW artists and arts organisations.
 - First Nations Engagement – better engagement with First Nations artists, arts organisations and communities.
 - NSW Priority Areas - more targeted support for and engagement with artists, arts organisations and communities from the NSW Government's other priority populations.
 - Spaces for Art - assisting the sector to find affordable space to make and present work

The Review recognises that COVID-19 will continue to have an impact on government service delivery and budgets and on the sector. Given this, service organisations and government will need to work together to assist the sector's recovery.

Key recommendations of the report include that core funding for service organisations is best determined by the Artform Advisory Boards through the Arts and Cultural Funding Program, and that a strategic fund be established from 2021 to address gaps between sector demand and supply of key services.

With the release of this report Create NSW will:

- Invite feedback and undertake consultation with Service Organisations
- Establish a Service Needs Procurement budget for Create NSW's Arts & Culture Funding Program of \$300,000 per annum from 2021.

This funding will enable Create NSW to procure services for the sector from NSW arts and culture organisations. Specific areas of service delivery will be determined with reference to the six Priority Service Areas identified in the Service Needs Review.

2. Purpose

The Review confirmed that service organisations provide highly valued benefits to the arts and cultural sector, audiences and Create NSW. Service organisations are essential to the NSW Government's aims to support the sector to thrive and to increase participation in arts and culture across our diverse community. Focusing on needs and gaps means that this report places most emphasis on what needs to change to address unmet needs, while acknowledging the strengths, skills and expertise of service organisations and the significant benefits they have already delivered to the cultural, social and economic life of our State.

Questions explored by this review, as described in the Terms of Reference, include:

1. How are professional, capacity and sector development services to the arts and cultural sector being delivered in NSW?
2. What are the current and predicted future service needs of the sector?
3. Are these needs being met? (Gap Analysis)
4. What services should government/Create NSW support in the future?
5. What are the new models and options for future service delivery that government can consider?

As part of the Review, Create NSW prepared a Research Insights Paper (Appendix 1) which, presents findings and insights into sector service needs gained from the quantitative and qualitative research undertaken in February 2020. This included a survey of the sector with over 700 responses, desktop research and analysis, and interviews with NSW Service Organisations funded at the time.

This Service Needs Review Final Report draws on the findings summarised in the Research Insights Paper and takes into consideration the Artform Advisory Boards deliberations in May 2020 during assessment of the Service Organisations to inform recommendations for future support and direction.

In line with the Terms of Reference, recommendations in this Report aim to underpin funding reforms that would:

- Be flexible to accommodate the future needs of practitioners, organisations and their operating environment, service all professional career levels and be inclusive of all practitioners.

- Effectively and economically deliver professional, capacity and sector development services for the arts and cultural sector across all of NSW.
- Increase the impact of Government investment in arts and culture and contribute to growing thriving sectors, sustainable organisations and career pathways for professional practitioners at all career levels
- Increase the capacity of NSW artists and arts and cultural organisations to diversify their income and attract philanthropic funding.

3. Background

In 2019, the first phase of the NSW Government's review of the ACFP streamlined and improved funding opportunities for the arts and cultural sector by removing barriers to eligibility and providing fixed application timelines.

These initial changes were a crucial part of the Government's commitment to supporting the sector in NSW. They included new funding program guidelines and establishing new Artform Advisory Boards. The new programs and guidelines replaced previous grant categories, including the separate service organisations' category. The NSW Arts and Cultural Sector Service Needs Review is the second phase of the review of the ACFP.

Service organisations provide business and professional development, capacity-building, advice, advocacy and networking services that help individual artists and arts organisations to perform well, grow and thrive.

Service organisations may provide sector-wide services or tailor their work to specific artforms, or to creators, participants and audiences who face barriers to participation, such as artists with disability and people in regional NSW.

Service organisations also provide services to government, such as advice on policy and legislative reviews and ways to help government to connect with local communities and to design and deliver services that meet the needs of local communities.

4. NSW Government Support for Service Organisations

Create NSW currently funds service organisations that demonstrate their primary purpose to be providing expertise, key services and critical functions to members, organisations and individuals, of the NSW arts and cultural sector.

To qualify for support, service organisations must have an annual income over \$100,000. Until the recent Create NSW funding program reforms, 14 of these organisations were multi-year funded through a separate service organisation funding category and six were funded on a project or annual basis, having self-identified as service organisations.

In the 2020 round of multi-year funding (2021-24) most service organisations were invited to compete for multi-year funding. Of the service organisations who applied for multi-year funding under the new guidelines, six were successful in gaining yearly funding totalling \$1.545m p.a. for the next four years

Five service organisations were identified as offering significant services, either to specific artforms, or to the entire arts and cultural sector with a particular focus on volunteers. Given this, these organisations were invited to a negotiated funding agreement process.

Regional Arts NSW was involved in the Review of the Regional Arts Network also being undertaken in 2020. Given this review included revisiting the current structure of the Network to

consider new models for supporting its ongoing sustainability and relevance for the next 10 years, negotiating a new agreement with RANSW was delayed until the outcomes of the Regional Arts Network review were known.

Service organisations who were unsuccessful in the multi-year ACFP round were encouraged to apply for project or annual funding. Of the unsuccessful service organisations in the multi-year round, applications recommended and ranked highly by the assessing Artform Board but, not funded within the available budget, are considered 'unfunded excellence'.

The Government is also responding to the recent series of emergencies across NSW - drought, bushfires, floods and now COVID-19 - with additional funding to support recovery measures. In these uncertain times, with unprecedented calls from the community for help, the NSW Government is setting clear funding priorities to focus resources to areas of immediate need. Across the State, organisations whose funding is dependent on Government are, in many cases, needing to manage with the same, or less core funding. Increasing revenue and capacity to meet demand for services relies on:

- innovative thinking about how to make existing support go further
- strong focus on services most needed by the sector, and
- establishing and maintaining effective partnerships and collaborations.

The NSW Government has a strong desire to see service organisations perform well as a part of artform 'ecosystems', the broader arts, screen and cultural landscape and as part of the effort across the community to recover from the current unprecedented challenges. The recommendations from this review aim to support that goal.

5. Summary of Review Findings

The Service Needs Review comprised the following elements:

- Create NSW's March 2020 survey of 702 NSW artists, arts organisations and staff of the service organisations
- Create NSW's March 2020 interviews with CEOs of the 14 arts organisations funded as multi-year service organisations by Create NSW in 2020 and the six arts organisations that received annual funding from Create NSW in 2020 and self-identified as service organisations in the 2021 ACFP funding round
- Create NSW's 2020 research scan on trends from Australian and international jurisdictions
- Review of research reports on sector service needs for Create NSW in 2015 and the Australia Council in 2017
- Review of Create NSW and other NSW Government policy priorities
- Artform Advisory Boards' assessments for the 2021 ACFP funding rounds
- Create NSW and sector responses to the impact of the COVID-19 pandemic.

The Insights Paper provides background on the NSW service organisations, outlining the review methodology, identifying gaps and challenges in service needs for the sector and listing opportunities for the sector as identified through the survey, interviews and research.

To recap, the main findings of the Insights Paper were:

- Artists and arts organisations view arts sector services provided by NSW service organisations positively and express a strong need for a wide range of professional development and capacity-building services.
- The scope and operation of service delivery in NSW are consistent with the Australia Council’s 2017 research findings that “...the distinction between a service organisation and an artistic organisation has become increasingly blurred over time. Organisations that traditionally acted as producers and presenters of artistic content have extended their remit to support artists through service activities. Conversely, organisations that have traditionally limited themselves to service provision have also recognised the opportunities to leverage the talents of their members through directly presenting and even supporting the production of artistic work.”¹
- 61% of the artists surveyed by Create NSW in 2020 reported that, compared to five years ago, it is harder to earn a living from their creative practice.
- 53% of the arts organisations surveyed by Create NSW in 2020 reported that, compared to five years ago, it is harder for their organisation to operate.
- Artists and arts organisations surveyed reported that the highest rates for services that were required and not accessed were “Professional advice and expertise” (42%), followed by “Brokering partnerships, agreements, tours and creative opportunities” (41%) and “Finding affordable space for making and presenting” (40%). The current rate of access for these three services is between 20% and 30% of demand (Figure 1).
- Service organisations and other arts organisations emphasised challenges due to the lack of resources including staff, funding and infrastructure.
- Service organisations universally reported that resource constraints made it difficult to meet the existing demand for the sector’s service needs.
- Service organisations reported a strong need and desire for their core business to provide greater levels of support to the NSW Government’s priority populations, including:
 - First Nations artists and audiences
 - Artists and audiences with disability
 - Artists and audiences in priority regions: Western Sydney and regional NSW.

For more details please see Appendix 1.

¹ *Arts Sector Service Organisations Scan*, Australia Council for the Arts, May 2017, page 3

Survey - perceptions of importance of services

% of respondents reporting Extremely important and Very important	Artists and Arts Organisations %	Service Organisations %	Difference in importance
Be entrepreneurial and strengthen income generation	81%	83%	2%
Improve public communications, marketing and audience development	78%	86%	8%
Develop regional, national and international engagement, sales and touring.	74%	71%	-3%
Access industry standards and best practice	70%	89%	19%
Improve strategic and business planning, and financial management	68%	86%	18%
Engage with diverse communities	66%	89%	23%
Implement effective health, wellbeing and safety practices for artists and arts workers	65%	90%	25%
Engage with First Nations artists and audiences	62%	86%	24%
Find a mentor/be a mentor	61%	65%	4%
Access financial management and taxation advice	57%	66%	9%
Practice better governance, conflict management and negotiation	52%	80%	28%
Offer Awards and Prizes	45%	42%	-3%

It is clear that, except for 'Awards and Prizes', a majority in both groups consider these services to be *Extremely important* or *Very important*. However, there is a disparity between the groups, with service organisation respondents rating eight services highly (>80%), where artists and arts organisations respondents rated only three services this highly (>70%).

6. Create NSW Artform Advisory Board feedback

Feedback from Create NSW's Artform Advisory Boards following their assessment of applications from service organisations reveals that service organisations are strongly valued across the sector. Well-performing service organisations are considered critical to the ecosystem of the arts and culture industries they support in NSW.

There are a number of service areas in which well-performing service organisations stand out:

- **Innovation:** They work with new and emerging resources and technologies to support their membership, their artists, clients and audiences.
- **Networks and Reach:** They have strong networks that reach communities across geographic boundaries.

- Partnerships: They are able to leverage funding and relationships to bring artists and organisations into connection with future pathways for collaboration and new work.
- Inclusivity and Diversity: They have consultative and inclusive approaches, and they have strong commitment to a diversity of programming and artistic representation.

Where service organisations were seen to have room for improvement, there was board feedback on the need for innovation, and updated digital content production for greater service reach and accessibility.

7. Priority Service Areas

For this Final Report, Create NSW has identified 10 priority areas of current and future needs in the NSW arts and cultural sector where gaps exist in providing services to meet needs. These 10 priority areas consistently rated highly in all elements of the review process. The 10 priority areas of current and future service need for NSW artists and arts organisations are:

1. *Build entrepreneurial capacity and strengthen income generation*
2. *Improve public communications, marketing, and audience development*
3. *Develop regional, national and international engagement, production/exhibition sales and touring*
4. *Access industry standards and best practice*
5. *Improve financial management and strategic and business planning*
6. *Increase opportunities to develop professional artistic practice and sustain a career*
7. *Find affordable space to make and present work*
8. *Improve the use of technology*
9. *Improve the effectiveness of Government strategic policy and investment to increase participation in arts and culture, engage with First Nations artists and communities, engage with diverse communities and support the sector to thrive*
10. *Increase the capacity and effectiveness of service organisations.*

Table 1 in Section 7 below, *Recommended Actions* sets out six recommended actions which incorporate sector need identified by the 10 priority areas above. Some of these actions could be implemented directly by the service organisations. Some would also involve partnerships with other organisations in the NSW arts and cultural sector, such as State Cultural Institutions, major performing arts companies, major festivals and State Significant Organisations. Others are actions for Create NSW to incorporate into future funding agreements with service organisations, or to consider through future arts funding programs.

8. Recommendations

Recommendations obtained from this review of service needs fall into three categories:

1. Proposed actions for service organisations in engaging with the service needs of their membership, participant base and potential clients.
2. Broader proposed actions for Create NSW in supporting NSW-based service organisations in line with service needs.
3. Proposed actions relating to specific artform needs.

Service Areas	Recommendation	Recommended action: Service Organisations	Recommended action: Create NSW	Actions relating to specific artforms
1. DIGITAL RESOURCES	Service organisations to be encouraged to develop high quality web-based digital resource material and services to meet business and professional development needs	<p>Service organisations build expertise and capacity to develop training and support material using video and other digital resources for online delivery.</p> <p>Service organisations should consider the expanded reach that digital programs and resources offer to artists and organisations, particularly in the post COVID-19 context.</p> <p>RADOs should be encouraged to consider developing digital learning/practical advice modules for artist and organisations in their local region.</p>	<p>Create NSW considers initiatives to provide short-term contracted technology expertise for specific enhancements and/or working with specialists to create video resources.</p> <p>Create NSW to develop further Create Connects digital programming to address areas of sector service need.</p> <p>Create NSW builds the provision of digital initiatives by service organisations into funding contracts with service organisations.</p>	<p>All artform appropriate</p> <p>Museums and History Create NSW to scope online learning modules for volunteer-led museums and historical societies with Museums and Galleries of NSW and TAFE.</p> <p>Create NSW works with museum and collection management leaders in NSW to research and develop a best practice standard to inform digitisation of collections.</p>

Service Areas	Recommendation	Recommended action: Service Organisations	Recommended action: Create NSW	Actions relating to specific artforms
2. PRACTICAL FACILITATION	Service organisations to enhance their capacity to assist artists and arts organisations to manage, produce and market their work, thus attracting funding and different forms of investment, including philanthropy.	<p>Service organisations, where appropriate, offer managing and producing services for dance, theatre and music clients, and build capacity to respond to opportunities for professional development, partnerships, tours, sourcing funding and philanthropy and brokering spaces</p> <p>Literature service organisations to increase focus on facilitating partnerships and assisting writers to develop regional, national and international engagements.</p> <p>RADOs should be encouraged to consider developing digital learning/practical advice modules for artist and organisations in their local region.</p>	<p>Where appropriate to the specific service organisation's objectives, Create NSW to build the provision of direct management, production, or marketing services for the sector into funding contracts with service organisations.</p> <p>Create NSW should engage with Destinations NSW on regional arts marketing and promotion in connection with cultural tourism.</p> <p>Create NSW should consider creative leadership opportunities that engage with curating, producing and other areas of practical facilitation.</p> <p>Create NSW should review the 'Creating an Income Toolkit' to account for COVID-19 and re-promote to the sector.</p>	<p>All artform appropriate.</p> <p>Visual Arts, Dance, Theatre Scope potential funding opportunities or funding increases for specific existing entities including Arts on Tour, Performing Lines, Brand X, Critical Stages, Ausdance and Museums and Galleries of NSW to help facilitate/deliver more partnerships and produce/tour and exhibit more work across NSW</p> <p>Classical Music Create NSW should research the potential for a touring initiative to regional NSW.</p>
3. CAREERS DEVELOPMENT	Service Organisations to be encouraged to enhance their connections to State Cultural	Where appropriate, service organisations to collaborate with State Cultural	Create NSW to continue to seek partnership opportunities for service	All artform appropriate Museums and History

Service Areas	Recommendation	Recommended action: Service Organisations	Recommended action: Create NSW	Actions relating to specific artforms
	<p>Institutions, major performing arts companies and festivals, State Significant Organisations and relevant NSW Government agencies, to promote collaboration on career development pathways, mentoring, entrepreneurship and business development for NSW artists and arts organisations.</p>	<p>Institutions, major performing arts companies and festivals, State Significant Organisations, and relevant NSW Government agencies to develop better career pathways for artists through professional development, mentoring and profile-raising programs.</p>	<p>organisations with relevant NSW agencies, particularly the Department of Education, to identify opportunities for arts and cultural education providers to enhance transition from training to professional practice and better prepare practitioners for real world industry challenges.</p> <p>Create NSW to consider producer, curator, editor, technician and other arts worker opportunities within its Cultural Leadership Program.</p> <p>Create NSW to work with service organisations on career development strategies, including mentor and mentee programs.</p> <p>Create NSW should review the 'Creating an Income Toolkit' to account for COVID-19 and re-promote to the sector.</p>	<p>Create NSW should engage with M&GNSW, State Significant Organisations and Cultural Institutions to share curatorial and collections management knowledge through digital, online learning modules to support skills development for volunteer-led organisations across NSW.</p> <p>Investigate the potential roll-out of the 'hub and spoke model.</p> <p>Aboriginal Arts and Culture Create NSW to continue to develop opportunities for emerging Aboriginal curators, producers, artists and researchers with State cultural institutions that already have strongly established Aboriginal arts and culture programs and staffing.</p> <p>Visual Arts Create NSW to continue to create opportunities for artists with significant contemporary</p>

Service Areas	Recommendation	Recommended action: Service Organisations	Recommended action: Create NSW	Actions relating to specific artforms
			Where appropriate to a service organisation's objectives, Create NSW to build the provision of training and development pathways for artists and arts workers into funding contracts with service organisations.	art spaces including Artspace and the Museum for Contemporary Arts through its creative leadership and fellowship program. Create NSW to continue to scope the potential for international collaborations for contemporary arts-based creative leadership to take place following COVID-19 restrictions.
4. FIRST NATIONS ENGAGEMENT	<p>Service organisations should engage more closely with First Nations artists, arts organisations and communities.</p> <p>A dedicated service organisation or group of organisations is required for the sector.</p>	<p>Participation by First Nations' artists and arts workers becomes integral to governance and operation of service organisations.</p> <p>Service organisations consider support for First Nations arts and culture in all strategic and operational planning.</p>	<p>Undertake an Aboriginal-led review of service need for the sector that engages with arts and culture organisations, Land Council, local government agencies RADOs and other stakeholders.</p> <p>Create NSW to develop KPIs for the service organisations' 2021 multi-year funding agreements. KPIs will require the service organisations to work with the First Nations sector to build capacity in NSW First Nations arts organisations, in line with the</p>	<p>All artform appropriate</p> <p>Aboriginal Arts and Culture</p> <p>Create NSW to continue to work with First Nations leaders in the Artform Advisory Boards, Aboriginal Affairs and the arts and culture sector to identify the best approach to supporting First Nations access to services that enhance the sector and to better understand the resources required.</p>

Service Areas	Recommendation	Recommended action: Service Organisations	Recommended action: Create NSW	Actions relating to specific artforms
			<p>new Create NSW protocols, Local Decision-Making principles and the OCHRE Strategic Plan.</p> <p>There is a need to properly support a First Nations service organisation. 2Rivers and ACHAA make compelling cases for continued support.</p>	
5. NSW PRIORITY AREAS	Service organisations should be encouraged to provide more targeted support for and engagement with artists, arts organisations and communities from the NSW Government's other priority populations.	Service organisations to be encouraged to enhance their communication of the cultural, social and economic impact outcomes of programs in order to access diverse forms of government and non-government funding beyond the provision of core funding from Create NSW.	<p>Create NSW to consider increasing capacity for data collection and analysis, to better support the arts and cultural sector with evidence of impact of investment.</p> <p>Create NSW to produce a toolkit to assist artists and arts organisations to document and promote the cultural, social and economic impact of their programs.</p> <p>Create NSW to consider whether relevant service organisations need additional resources to contribute to Create NSW's work to embed arts and culture in cross</p>	All artform appropriate

Service Areas	Recommendation	Recommended action: Service Organisations	Recommended action: Create NSW	Actions relating to specific artforms
			agency and whole of government policy and service delivery frameworks.	
6. SPACES FOR ART	Assist the sector to find affordable space to make and present work	Service organisations, regardless of artform, to seek partnerships with other organisations, local councils and landholders to find affordable spaces for artists to work in, where appropriate to the service organisation's mission.	<p>Create Infrastructure to consider expanding its reach/portfolio to include brokering access to existing spaces with Local Councils and commercial property owners, removing barriers for artists to access unused spaces.</p> <p>Create NSW to again offer its <i>Making Spaces</i> program and to include resourcing creative producers.</p>	<p>All artform appropriate</p> <p>Visual Arts, Dance, Theatre</p> <p>Service organisations engaged with leveraging support for artists through the provision of working space should work with Create NSW to broker partnerships for the delivery of this outcome.</p>

9. NSW Government Support for Service Organisations – Next Steps

The Service Needs Review aimed to determine what services the NSW Government should support in the future and what might be the best models and options for future service delivery to the arts and cultural sector.

The recommendations in this report provide a means to more sharply focus the work of service organisations in NSW and to give that work greater reach and relevance. The survey and research inputs to the Review have given clear priorities for professional development and capacity building across the sector. These are reflected in the recommendations.

Reforms of Create NSW funding programs, successful implementation of sector Artform Advisory Boards, and the Boards' most recent round of funding assessments have given a further indication of the direction the NSW Government and the sector wants service organisations to take.

The outcomes of the review process indicate that core funding for service organisations is best determined by the Artform Advisory Boards through the Arts and Cultural Funding Program, but that specific gaps in service needs can be delivered through a service procurement process.

With a view to strategic application of the Review recommendations, as outlined in the recommended actions for both Create NSW and service organisations, next steps will involve consultation with service organisations and major arts and cultural organisations to determine capacity for implementing actions within existing resources.

Next steps for implementation:

1. Consultation with Service Organisations:
 - a. Release Service Needs Review Final Report
 - b. Invite feedback from Service Organisations
2. Create a Service Needs Procurement budget for Create NSW's Arts & Culture Funding Program of \$300,000 per annum from 2021.

This funding will enable Create NSW to procure specific services from NSW arts and culture organisations in NSW. Specific areas of service delivery will be determined with reference to the six Priority Service Areas identified in the Service Needs Review.

Appendix 1: Review of NSW Arts & Cultural Sector Service Needs 2020 - Research Insights Paper - April 2020

***NOTE:** This paper was developed in April 2020 to give the Artform Boards preliminary insights into sector service needs based on the research conducted up to that time. This was prior to the Final Review Report and prior to any assessment of funding applications. It was not the aim of this paper to analyse the performance of specific organisations, or to provide direct input to the assessment by the Artform Boards of individual funding applications.*

REVIEW OF NSW ARTS & CULTURAL SECTOR SERVICE NEEDS 2020

RESEARCH INSIGHTS PAPER

Create NSW

April 2020

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Create NSW Review of NSW Arts & Cultural Sector Service Needs 2020

Research Insights Paper

1. SUMMARY OF FINDINGS

Research shows that artists and arts organisations view arts sector services provided by service organisations positively and express a strong need for a range of services. The top service priorities identified by artists and arts organisations include:

- Building entrepreneurial capacity and strengthening income generation
- Professional advice and expertise, e.g. legal, financial, marketing and technology
- Brokering of partnerships, agreements, tours and creative opportunities
- Finding affordable space for making and presenting

Service organisations identified the most important areas for service provision to include:

- Implementing effective health, wellbeing and safety processes/protocols
- Providing access to industry standards and best practice

Research shows that service organisations seek to provide a wide range of services either to members and immediate stakeholders, where an organisation is constituted on membership basis and/or for a specific artform, and/or to serve the entire arts and cultural sector.

Service organisations universally identified resource constraints as a negative factor in meeting demand for services.

Service organisations also noted a strong need and desire for their core business to provide greater levels of support to priority population groups and audiences, most often those identified by funding bodies. These include:

- Priority regions, such as Western Sydney, and Regional NSW
- People with a disability
- First Nations

Of note is that the research shows that service organisations consider some services to be of much higher importance than artists and arts organisations, who consider different services to be a priority. This may reveal new gaps in service provision and/or gaps in how service organisations engage with the arts sector.

2. BACKGROUND

2.1. Review of the Arts and Cultural Funding Program

In 2019, the NSW Government's review of the Arts and Cultural Funding Program included streamlining and improving funding opportunities for the sector by removing barriers to eligibility and providing fixed application timelines. These changes are a crucial part of the government's commitment to supporting the arts and cultural sectors and include new funding program guidelines and establishing new Artform Boards. The new programs and guidelines replaced previous grant categories, including the separate service organisations' category.

The services provided by service organisations are important to enabling individual artists and arts organisations to perform well, grow and thrive. This review of service provision and support for professional development across the NSW is part of the review of the Arts and Cultural Funding Program. This Insights Paper presents findings and insights into sector service needs gained from recent quantitative and qualitative research that included a survey of the sector with over 700 responses, desktop research and analysis, and interviews with currently funded NSW Service Organisations.

2.2. Defining arts and cultural sectors' services

A national scan of service organisations published by the Australia Council in 2017 defines service organisations as having a **core purpose to provide programs and activities that support artists and art producers/presenters, and do one or more of the following:**

- Promote a particular art form overall
- Deliver sector-specific programs
- Support organisations and individuals involved in a particular creative practice.

The Australia Council report also noted that:

...the distinction between a service organisation and an artistic organisation has become increasingly blurred over time as creative organisations are extending their remit to support artists through service activities. Service provision organisations have also recognised the opportunities to leverage the talents of their members through directly presenting and even supporting the production of artistic work.

2.3. Create NSW descriptions of services

For the purpose of this review, Create NSW has used 12 service descriptions. These are drawn from the 2017 Australia Council Scan of Services Organisations and a 2015 Review of Service Organisations by consultants, Positive Solutions commissioned by Arts NSW.

The table below lists the 12 service descriptions used in the sector survey for this review and includes minor variants to some of the service descriptions for noting.

Create NSW service descriptions used in the Sector Survey	Minor variants of some service descriptions
Professional Support, Information and Communications	Member communication
Industry Leadership, Solidarity and Advocacy	Public communication; Industry standards; Research
Skills development and capacity building	Professional development & training
Brokering of partnerships, agreements, tours, creative opportunities	Regional engagement
Artist/Organisation promotion	Member promotion; Awards, Conferences & Events
Grant opportunities	Member income generation; Management of devolved programs
Professional advice and expertise e.g. legal, financial, marketing and technology	
Networks and contacts	

Create NSW service descriptions used in the Sector Survey	Minor variants of some service descriptions
Insurance	
Employment/contract opportunities	
Auspicing/administrative support for grants management	
Finding affordable space for making and presenting	

2.4. Purpose of this Review

This review aims to establish the existing sector service needs, identify any gaps in services currently being offered and inform streamlined, future support for service provision to the arts and cultural sector across NSW. Questions explored by this review, as described in the Terms of Reference include:

1. How are professional, capacity and sector development services to the arts and cultural sector being delivered in NSW?
2. What are the current and predicted future service needs of the sector?
3. Are these needs being met? (Gap Analysis)
4. What services should government/Create NSW support in the future?
5. What are the new models and options for future Service Delivery that Government can consider?

The focus of this Insights Paper addresses the first three questions. The remaining questions will be explored following engagement with, and advice from the Artform Boards and the Minister for the Arts after the outcomes of the 2020 grants' assessment process.

2.5. Currently funded service organisations

Create NSW currently funds 20 service organisations that demonstrate their primary purpose to be providing expertise, key services and critical functions to members of the NSW arts and cultural sector.

To qualify for support, service organisations must have an annual income over \$100,000. Until the recent funding program reforms, 14 of these organisations were multi-year funded, through a separate service organisation funding category and six were funded on an annual basis, having self-identified as service organisations.

In the current round of multi-year funding most service organisations have been invited to compete for multi-year funding. Currently funded service organisations are categorised as per the following table:

(NOTE: "Application Category" indicates only the category of funding for 2020 and/or the category of funding in which the organisation is invited to apply for funding in 2021. It does not indicate the allocation of funding for 2021.)

Organisation	Sector Services Category	Primary artform	Artform Board	Application Category
Accessible Arts	Industry wide	Disability Arts	Multi-arts	Multiyear 2021
Arts Law Centre of Australia	Industry wide	Multi-Arts	Multi-arts	Multiyear 2021

Organisation	Sector Services Category	Primary artform	Artform Board	Application Category
Brand X Productions	Industry wide	Multi artform	Multi-arts & Festivals	Annual 2020 Multiyear 2021
Diversity Arts Australia	Industry wide	Multi artform	Multi-arts & Festivals	Annual 2020 Multiyear 2021
Sydney Arts Management Advisory Group	Industry wide	Multi artform	Multi-arts & Festivals	Annual
APRA/Sounds Australia	Artform-based	Music	Contemporary Music	Annual 2020 Multiyear 2021
Arts on Tour	Artform-based	Multi-Arts	Multi-arts & Festivals	Multiyear 2021
Ausdance NSW	Artform-based	Dance	Dance & Physical Theatre	Multiyear 2021
Band Association of NSW	Artform-based	Community Arts and Cultural Development	Classical Music	Multiyear 2021
Museums and Galleries of NSW	Artform-based	Other	Museums & History	Multiyear 2021
Music NSW	Artform-based	Music	Contemporary Music	Multiyear 2021
NSW Writers' Centre Inc	Artform-based	Literature	Literature	Multiyear 2021
National Association for the Visual Arts	Artform-based	Visual Arts (including Craft and Design)	Visual Arts	Multiyear 2021
Playwriting Australia	Artform-based	Theatre (including Circus and Physical Theatre)	Theatre	Multiyear 2021
Royal Australian Historical Society	Artform-based	History	Museums & History	Multiyear 2021
Theatre Network NSW	Artform-based	Theatre (including Circus and Physical Theatre)	Theatre	Annual
Octapod Association	Regionally focused	Community Arts and Cultural Development	Multi-arts & Festivals	Multiyear 2021
Rumpus Skillshare	Regionally focused	Community Arts and Cultural Development	Multi-arts & Festivals	Multiyear 2021
Regional Arts NSW	Regionally focused	Multi artform	Multi-arts & Festivals	Multiyear 2021
Westwords	Regionally focused	Literature	Literature	Annual 2020 Multiyear 2021

2.6. Service provision in regional NSW

Research shows that service organisations all consider that they have a responsibility to serve regional NSW, with many expressing the desire for a greater regional reach and presence. Four of the organisations listed are considered 'regionally focused', but in three cases these encompass predominantly metropolitan audiences, serving Newcastle/Hunter; Wollongong/Illawarra and Western Sydney 'regions'. Of the four, only Regional Arts NSW (RANSW) has a completely non-metropolitan focus, existing to serve the Regional Arts Network.

The Regional Arts Network is made up of 14 Regional Arts Development Organisations (RADOs) and Regional Arts NSW. The latter is one of the 20 service organisations listed above. The Regional Arts Network aims to build, in partnership with local councils, sustainable strategic organisations to deliver services in regional areas. RADOs have established relationships with local partners, funding bodies and other government departments. The Regional Arts Network falls within the scope of this review but is subject to a separate timeframe and process.

2.7. Services provision by other organisations

In addition to service organisations funded by Create NSW, the arts and cultural sector are supported by other arts organisations that either do not receive funding from Create NSW or receive funding in another category. The 2017 Australia Council report also observed that the *distinction between a service organisation and an artistic organisation has become increasingly blurred over time.*

While the sector needs survey was anonymous, the significant number of responses (702) gives confidence that the views of other organisations not funded by Create NSW were also captured, and that the role of these organisations in professional development and capacity building will inform the design of future support programs.

3. REVIEW METHODOLOGY

This Review employed three research methods to gain insights into service provision for the arts and cultural sectors. These were:

1. An online *Sector Needs Survey*, open for responses from 'artists', people within 'arts organisations' and people within 'service organisations' across three weeks from 9-27 March 2020
2. Interviews with leaders of service organisations - individual 30-45minute interviews with the leaders of the 20 service organisations currently funded by Create NSW
3. Desktop Research, including
 - a. Examination of the financial, establishment/governance, and program status of each of the 20 funded service organisations
 - b. A scan of sector service provision across other Australian and selected international jurisdictions
 - c. Analysis of previous reports by the Australia Council (2017) and Create NSW (2015) into service needs and provision for the sector.

4. ANALYSIS OF INPUTS & FINDINGS

4.1. Arts Sector Service Needs Survey 2020

The survey closed with 702 complete responses. The majority were from artists (333, 47%) followed by people working within an arts organisation (213, 30%) and 156 people from an organisation that provides services to the sector (22%).

Information about respondents showed a general cross section of responses from all artforms, career stages and demographics. Of the artists and arts organisations responding a significant number identified 'visual arts' as their primary artform.

Following are key findings and highlights from analysis of the survey data.

4.1.1. *Survey Highlights*

- As a group, artists and arts organisations expressed a clear need and support for the provision of professional development and capacity-building services. This was evident from the need reported for a broad range of services and the reported substantial levels at which they access these services.
- 88% of respondents noted services they require for their practice or organisation but are not able to access. Only 12% of respondents noted that they were able to access all the services they required. This finding highlights gaps in the delivery of services to the sector.
- The main reasons given by artist and arts organisation for not accessing services which they need, include cost and time constraints and/or that a service is too difficult to access. This means that the service is not actually provided by, or available from a service organisation in their place/region of the State. In some rarer cases it may mean that it is not accessible due to other factors, such as for people living with a disability.
- Service organisations generally placed much higher importance on some services than artists and arts organisations. Over 80% of respondents within service organisations rated eight services as Extremely important or Very important, whereas artists and arts organisations rated only three of these services as highly (see table on page 8: Survey - perceptions of importance of services).
- Artists and arts organisations reported 'being entrepreneurial' and 'strengthening income generation' as the most important services for them, while service organisations reported 'implementing effective health, wellbeing and safety processes/protocols' as the most important, followed closely by 'providing access to industry standards and best practice'. 'Awards and Prizes' rated as least important to both groups.

4.1.2. *Respondents' background and circumstances*

The survey invited respondents to identify themselves in the following ways:

'I'm an artist' – The artist respondents, in general, were from a representative cross section of artforms, diversity, career stage and geography. Artists mostly reported that it is more difficult to participate in their creative practice than five years ago. They strongly believe that, compared to five years ago, it is harder to earn a living.

'I work within an arts organisation' – The arts organisations were more likely to be from regional areas (one in three) than artists who responded (one in four). Overall, there was a cross section of representation. Aboriginal arts and culture and digital arts had lower response rates. Almost half of all responses were from "Small to Medium Arts Organisations".

- Most respondents disagreed that it was easier for their organisation to operate.
- Almost all respondents agree that their organisation is an inspiring place to work and that it is connected to a community.
- When asked if they had "access to the skills support and opportunities they needed for their organisation to thrive" people working in arts organisations registered responses in the middle of the scale (Somewhat agree 39%; Neither Agree nor Disagree 19%; Somewhat disagree 27%)

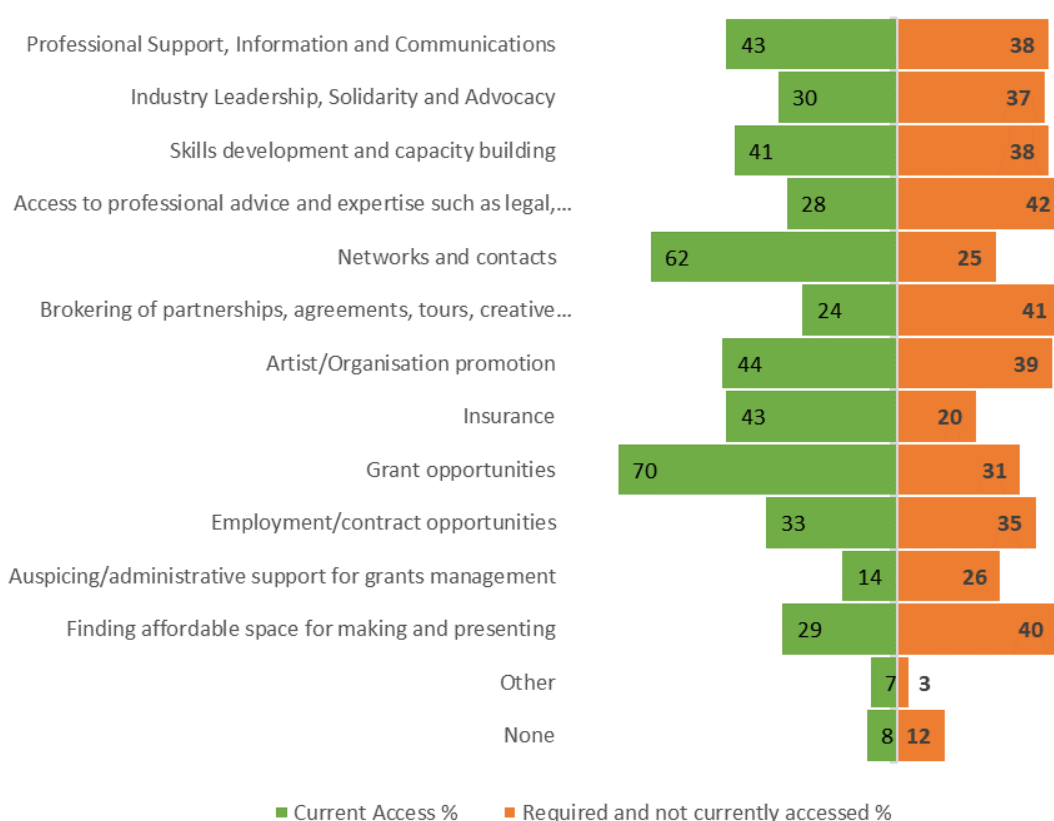
'I work within an organisation that provides service to the sector' – The responses from service organisations had similar characteristics to the responses for arts organisations in terms of geography and diversity.

Most organisations that provide services to the sector reported that they provide services to the general public (75%) followed by professional artists (70%) and non- professional artists (51%). Respondents could select multiple options for their service delivery. Responses were generally positive when asked about the service organisation ability to deliver services that the sector needs and slightly less positive when asked about the organisation’s financial health.

4.1.3. Current service needs and access for artists and arts organisations:

Artists and those who work in an arts organisation were asked which services they currently access and which they required but did not currently access.

The diagram below shows that the highest rates for services that were required and not currently accessed were Professional advice and expertise (42%) followed by Brokering of partnerships, agreements, tours and creative opportunities (41%) and Finding affordable space for making and presenting (40%). The current rate of access for these services is between 20 and 30%.



When asked to describe the reasons for not accessing these services the most common response was:

- Service is too expensive to access (21%)
- Do not have enough time or resources to access services (19%)
- Service is too difficult to access (19%). Service is not provided was also common (16%).

All respondents were asked to rate a more detailed list of key service areas. The table below shows the perception of the importance of specific services by service organisations as compared with artists and arts organisations.

Survey - perceptions of importance of services

% of respondents reporting Extremely important and Very important	Artists and Arts Organisations %	Service Organisations %	Difference in importance
Be entrepreneurial and strengthen income generation	81%	83%	2%
Improve public communications, marketing and audience development	78%	86%	8%
Develop regional, national and international engagement, sales and touring.	74%	71%	-3%
Access industry standards and best practice	70%	89%	19%
Improve strategic and business planning, and financial management	68%	86%	18%
Engage with diverse communities	66%	89%	23%
Implement effective health, wellbeing and safety practices for artists and arts workers	65%	90%	25%
Engage with First Nations artists and audiences	62%	86%	24%
Find a mentor/be a mentor	61%	65%	4%
Access financial management and taxation advice	57%	66%	9%
Practice better governance, conflict management and negotiation	52%	80%	28%
Offer Awards and Prizes	45%	42%	-3%

It is clear that, except for 'Awards and Prizes', a majority in both groups consider these services to be *Extremely important* or *Very important*. However, there is a disparity between the groups, with service organisation respondents rating eight services highly (>80%), where artists and arts organisations respondents rated only three services this highly (>70%).

4.2. Service Organisation Interviews

4.2.1. How do the service organisations determine the needs of the sector?

- Only three of the 19 service organisations interviewed reported not using formal means to collect data on the needs of the sector's they serviced.
- Service organisations conduct regular surveys; analyse other agencies' research and data; have formal roundtables and conferences; and undertake community/stakeholder consultation.
- One service organisation reported that it records, categorises and analyses every phone enquiry it receives and uses this information to determine the needs of its sector.
- Another produces a longitudinal study; it conducts a census to determine the current state of its sector

- Service organisations also reported informally collecting information to understand the needs of the sector. For example, they gathered information from their members, board members, contacts in the wider sector, local government and reference groups, stakeholder feedback, and other service organisations.

4.2.2. *What services are most commonly requested of the service organisations?*

- Business management: finances, tax, contracting, leases, other legal advice, governance, HR (particular as it relates to mental health), insurance, fees, regulatory frameworks, managing risk, business model planning, volunteer training, marketing, working with children
- Funding: financial support, grant writing advice, auspicing, where to get funding,
- Career development: how to 'break into' an industry, help understanding how an industry works, job opportunities, how to be selected for opportunities, organising/delivering tours, mentoring opportunities, networking, residencies
- Artistic development: opportunities for artistic development, education and training,
- Sector/artform specific: accessing workspace, information about services/personnel in the sector, facilitating discussion on important topics in the sector, audience development for Western Sydney artists, sector advocacy, capacity building advice, community building, CALD and accessibility/disability training and advocacy, specific services for Aboriginal artists, to run projects or deliver events
- Technology/communications: online resources such as information sheets and templates, how to use social media, regular news about the sector

17 out of 19 service organisations stated that they provide the services that are most commonly requested of them (or refer enquiries to more appropriate organisations).

4.2.3. *What are the common services being provided by the service organisations?*

- Providing advocacy and raise awareness on sector issues
- Providing expert advice to government agencies, including Create NSW, on policy and programs
- Representing artists, organisations and audiences from priority populations to government and other organisations and institutions across the sector
- Providing research and disseminating information, which is increasingly in digital format and online
- Facilitating and brokering access to resources and creative opportunities, such as touring, residencies and mentorships
- Facilitating and providing networking opportunities, including running conferences and events
- Promoting and providing professional development through education and training, particularly in business skills

Providing day-to-day general written and verbal advice in response to enquiries from the sector

4.2.4. *What gaps in the sector are the service organisations reporting?*

Service organisations reported similar gaps across artforms. These included:

- Regional NSW– lacking capacity to deliver services to regional NSW; resources available to regional artists are limited.
 - Funding issues – sector does not know how to develop income streams and successfully ‘pitch’ themselves to government and other funders; impact of reduced funding for the arts; local government support is limited; less long-term core funding.
 - Business development – sector lacks business skills training that is tailored to the arts, and there is general lack of knowledge and skills including tax, governance, management; lack of succession planning especially for small and volunteer organisations
 - Technology – inability/lack of capacity in service organisations to use technology effectively, e.g. to automate some services, disseminate information, deliver online programs, connect with regional NSW
 - Capacity to respond to sector requests – service organisations stated repeatedly that they found it very difficult to meet the demands of the sector and respond to service requests in a timely manner
 - Aboriginal arts – Aboriginal organisations need more support to work with their communities, greater inclusion in the sector, and there was a lack of engagement with best practice and knowledge of Indigenous Cultural Intellectual Property
 - Networking and connections – sector do not know how to access services and expertise for their work, sector is fragmented, and artists lack peer support, connections between ‘silo’ organisations
 - Disability – data collection, access and inclusion, training, knowledge and awareness, NDIS does not fund cost of artists’ professional practice, project grants, grants for disability access costs for organisations
- Other gaps mentioned – access to affordable space and resources, deep engagement with Western Sydney, CALD in leadership roles and diversity in screen sector, capacity to undertake research and data, tailored services for professional development, and services for mid-career artists.

4.2.5. Challenges for the service organisations and the sector

Lack of resources: By a large margin, the most frequently mentioned challenge for both the service organisations and the sector is their lack of resources including staff, money, infrastructure. The service organisations repeatedly reported being unable to meet the demands of their users. Indeed, some could not meet *most* demands upon them. One interviewee perceived that funding bodies have an expectation that service organisations should do more without understanding how few resources they have.

Funding issues: Along the same theme, the service organisations repeatedly nominated funding availability and policy to be a challenge. In particular:

- Service organisations competing for the same pool of money as the artists and organisations they serve
- Most of the service organisations found it very difficult to raise money through donations and philanthropy but felt pressure from government to do so. Some could raise money for specific programs, but securing core program funding was difficult
- Many service organisations were aware they could not survive without funding from Create NSW

- Lack of long-term funding arrangements lead to financial weakness and insecurity
- Some service organisations expressed concern that the stakeholders they serve are not a priority for Create NSW

Much of the funding available to the arts sector is project funding, which is not always the best 'fit' for the work of service organisations

4.2.6. Other challenges

Note: Interviews were conducted as the impacts of the COVID-19 pandemic were intensifying, particularly for the arts and cultural sector. This was seen as the most significant challenge for service provision to the sector in the immediate and medium terms. Other, current and longer-term challenges were reported to include:

- For community-based artists and organisations the cost of hiring venues was a challenge – only professionals, not volunteers, are permitted to be used for events
- Cost of living in regional NSW has increased
- Cost of living for staff of service organisations – salaries are not paid at the market rate
- Becoming harder to make a living/earn money in the arts
- Generally, business operating costs are increasing

4.3. Opportunities for the sector identified by service organisations

4.3.1. Policy opportunities

- Encourage the sector and funding bodies co-create strategies
- Long-term audience development strategies
- Meeting sector needs for standards and codes of practice and the training to implement these
- Greater cooperation between service organisations to reduce duplication
- Institute mental health awareness and training programs
- Improve collaboration on 'whole of sector' policy approaches and strategic initiatives
- Greater collaboration between major arts organisations and institutions and the rest of the sector
- Possible merging of some service organisations and shared corporate services
- Disability awareness training for Create NSW's Arts Advisory Boards

4.3.2. Program and creative opportunities

- Subsidise programs for vulnerable communities
- Increase funding to allow service organisations to deliver more services to regional NSW
- Provide more mentorship opportunities and programs
- Provide more opportunities for CALD and Aboriginal artists, and artists with a disability
- Investigate and promote opportunities for longer term projects and partnerships
- Greater emphasis on Aboriginal arts development
- Improve resources to employ Aboriginal staff to deliver programs in arts organisations

- More artists/arts workers in regional Aboriginal communities
- More resources for Aboriginal cultural centres and keeping places
- Funding/new programs for arts organisations to make programs inclusive for people with disability and artists with disability

4.3.3. *Business and professional development opportunities*

- Tailored arts business skills training for the sector
- Grant application training
- 'Hub and Spoke' model for regional skills development and on the ground support
- Long-term funding arrangements for arts organisations
- Help to increase commercial/philanthropic support
- Education in legal matters and risk management
- Greater skills sharing across the sector (peer to peer)
- First Nations leadership program
- Subsidised employment opportunities for artists with disability
- Investment in CALD sector to create sustainable enterprises

4.3.4. *Infrastructure*

- More affordable living, working and exhibition/performance spaces
- Capital infrastructure investment in the theatre sector
- Professional arts centres in regional NSW

4.3.5. *Technology*

- Expanding digital services, including training in efficient ways to deliver services with limited funding
- Encourage digital preservation of historic records in regional museums
- Training in the use of social media for some artists and arts organisations
- Improving digital communications and providing online resources in regional NSW which, for example, could be provided through decentralised NSW government departments or regional libraries
- Video conferencing extended for regional NSW

4.3.6. *Networking and connection opportunities*

- More artist collaboration opportunities
- Greater collaboration in the theatre sector
- A database of relevant consultancies/agencies that can fill service gaps
- Regular seminars and conference programs that extend to regional NSW
- Showcase - NSW producers and NSW venues in the theatre sector
- A 'speaker's bureau' for the CALD sector

4.3.7. *Research and development work*

- Embed research and development in core programs of service organisations
- Ongoing evaluation of the sector to determine needs and inform support programs
- More research on the needs of each specific regional NSW area (demographic/geography etc) for targeted services
- Research to understand the legal services needs of the sector and the cost of delivery
- Mechanisms to encourage data collection on the disability sector

4.4. Desktop research

4.4.1. Summary of previous reviews and reports

Australia Council Arts Sector Services Organisation Scan, 2017

Arts NSW: Future Support for Service Organisations, prepared by Positive Solutions, 2015

Overview

The research findings summarised in this Insights Paper are consistent with research undertaken by the Australia Council in 2017 and the review of support for service organisations commissioned by Arts NSW in 2015. At that time, the latter review recommended that future investment in the sector's service needs should consider that service organisations are:

- Increasingly engaged in both service activities and artform delivery
- Less likely to be based on a traditional artform and membership model and more likely to adopt a positioning that is a mix of artform, constituents (practitioners, organisations and audiences) and cultural affiliation - often evident in multi artform and regional organisations
- Becoming more responsive to opportunities arising from partnerships and networks between organisations, groups and individuals

The 2015 report recommended that *the diversity of service organisations would be more recognised by funding through Create NSW's general organisations category rather than a stand-alone category that attempts to narrowly define a 'service organisation'*. The changes to funding categories and guidelines resulting from the 2019 review of the Arts and Cultural Funding Program have implemented this recommendation.

Australia Council 2017 Research

In its national scan of service organisations, the Australia Council identified and categorised a total of 111 organisations. The breakdown of service organisations in NSW by 'industry-wide', 'artform' and 'regionally-focused' outlined in this Insights Paper is broadly consistent with the findings in the table below. The relatively smaller proportion of organisations whose remit is 'strategic', cross-artform or industry-wide is reflective of the situation in NSW. This is also the case where service organisations are classified by artform, where 9 of the 20 NSW service organisations listed in the table above, will have funding applications assessed by the Multi-arts and Festivals Artform Board.

Multi Art (half state-specific, majority focus on accessibility, touring, regional arts)	26 (24% of total)
Music	18
Literature (mainly state and regional writers' centres)	17
Visual Arts (mainly craft, museum/gallery services)	11

ATSIA (split between national, state and regional)	11
CACD (mainly national)	6
Dance (mainly state)	6
Strategic (cross artform, tasked with legal issues or capacity building)	5
Theatre (mainly national, serving subsectors such as script writing, physical theatre)	5

Similarly, the Australia Council analysis provided a breakdown, by service description, and the proportion of services delivered by the organisations identified in the scan, that is consistent with the findings of this review.

The table below shows the % of organisation's service provision by category and business models:

Member Communications	97%
Capacity Building	83%
Member Promotion	79%
Sector Leadership	66%
Member Income Generation	59%
Advocacy	43%
Research and Evaluation	36%
Public Communications	35%
Management of Devolved Programs	28%
Industry Standards	14%

Arts NSW 2015 Review Findings

At the time of this review in 2015 there were 14 service organisations funded by Arts NSW. Most organisations were membership based and nearly all provided the following services:

- professional development/training
- member communications
- online calendar of activities
- advocacy and regional engagement.

Additionally, at least two-thirds of the organisations provided the following: networking; industry conferences; support with grant applications; development of strategic partnerships and research.

In the 2015 report artists and organisations reported the most frequent reasons for joining or subscribing to the service organisations were:

- networking and contacts
- industry solidarity and advocacy
- access to professional advice

- assistance with grant applications and promotion
- access to insurance

Issues for service organisations included:

- Affordability and the need for most services to be provided for free or at low cost
- Arts sectors' limited ability to generate philanthropic or corporate income
- Arts sectors' demand outstripping service organisations' ability to meet it
- Increasing collaboration between service organisations, but a resistance to mergers

Desirable future services provision included service organisations should:

- Increase regional engagement
- Increase technological delivery including the ability to offer digital advice/support to the sector
- Provide stronger support for mid-career practitioners
- Provide specific engagement and services for Aboriginal artists
- Provide training to strengthen entrepreneurship and career planning skills
- Provide state-wide research data particularly around impacts of arts programs
- Find way to address arts accommodation issues

Gaps identified by artists and arts organisations in current service provision included:

- Affordable space for artists
- Advice on financial services, legal and governance advice; strategic planning; grant applications
- Enhanced networking opportunities
- More opportunities to showcase work
- More mentors across artforms
- More resources to increase assistance
- Additional services in regional areas
- Support for mid-career and senior artists

Comparison of the results from the 2015 review above with the results of the 2020 Sector Needs Survey in this Insights Paper, reveals many similarities in terms of the needs of the arts and cultural sector and the gaps in service provision.

4.4.2.Arts & Culture Sector Services - Australian and Selected International Jurisdictions

Jurisdiction	Agency	Service Organisations	Services & Artforms	How are they funded?
NATIONAL				
Victoria	Creative Victoria, within the Department of Jobs, Precincts and Regions.	14 organisations are funded through the Organisations Investment Program (OIP).	10 are artform-based and four deliver sector-specific services. In this capacity, many produce new work. In Creative Victoria's creative industries strategy, Creative State 2016-20, peak body and service organisations are framed as partners in the delivery of the five action areas of backing creative talent, strengthening the creative industries ecosystem, delivering wider economic and social impact, increasing participation and access and building international engagement.	There is not a specific funding stream for service organisations. The Organisations Investment Program (OIP) provides multi-year operational funding to 87 small, medium and large organisations (excluding major performing arts organisations). The Program's funding calendar has been aligned with the anticipated release of the second four-year strategy in mid-2020.
Queensland	Arts Queensland, within the Department of Environment and Science.	13 organisations are funded through the 2017-20 Organisations Fund.	Funded organisations include peak bodies Museums and Galleries QLD, Woodford-based QLD Folk Federation and BlakDance Australia - which also engage in artform presentation.	There is not a specific funding stream for service organisations. As a result of the COVID-19 crisis, the 41 current recipients of 2017-20 Organisations Fund have received further funding until December 2021. Applications for the 2021-24 Organisations Fund have been deferred.
South Australia	Arts and Culture (previously Arts SA) within the Department of Premier and Cabinet.	Four service organisations are funded through the Arts Organisations Grants Program.	The organisations - Ausdance SA, Guildhouse, Music SA and Writers SA - have an artform focus and a membership structure. In addition, organisations such as JamFactory Contemporary Craft & Design (funded through Arts Organisations) and Country Arts SA and the conservation service provider Artlab Australia (funded as statutory authorities) play a major role in sector capacity building.	There is not a specific funding stream for service organisations. Through South Australia's Arts and Culture Plan 2019-24, funding programs are currently under review with the sector to be advised of the outcome in mid-May 2020.
Western Australia	Culture and the Arts, within the Department of Local Government,	11 service organisations are funded through the Arts	Funded arts, cultural and creative sector service organisations have a focus combining artforms, constituents and audiences to varying and overlapping degrees and in the case of Aboriginal	The Arts Organisations Investment Program (AOIP) provides three-year funding to 37 organisations. Small to medium organisations are required to apply for a minimum of \$100,000 in

Jurisdiction	Agency	Service Organisations	Services & Artforms	How are they funded?
	Sport and Cultural Industries.	Organisations Investment Program (AOIP).	Art Centre Hub WA (AACHWA) and Kimberley Aboriginal Law and Culture Centre (KALACC) are Indigenous led.	one of two categories - Producing and Presenting or Service. Most of the funded service organisations, however, are engaged in presentation. \$31 million will be provided to the 37 organisations.
Tasmania	Arts Tasmania, within the Department of State Growth.	Five organisations are funded through the Organisations and Organisations (multi-year) program.	The multi-year funded organisations – Design Tasmania and Performing Lines (Tasmania Performs) - and the organisations with 2019-20 grants – Australian Script Centre, Contemporary Art Tasmania (CAT) and Taswriters - provide varying combinations of service delivery and program presentation around artforms. In the area of cultural heritage management there are no funded service organisations. As an alternative, Roving Curators, the Launceston-based museum and cultural heritage professionals, delivers services which are assigned by competitive application to Arts Tasmania which supports this program with two Arts Tasmania personnel.	There is not a specific funding stream for service organisations. Overall, the Organisations and Organisations (multi-year) program is providing funding to 23 organisations in 2019-20.
Australian Capital Territory	artsACT, the arts agency of the ACT Government.	Six organisations are funded through the Key Organisations Funding Category.	The organisations provide programs, services, expertise and infrastructure to support and develop the arts in ACT. The organisations are – ACT Writers Centre, Ainslie and Gorman Arts Centres, Canberra Potters Society, Craft ACT, Music for Canberra and Tuggerong Community Arts Association.	There is not a specific funding stream for service organisations. While the ACT Government conducts a review of its funding arrangements and support mechanisms in line with its 2015 ACT Arts Policy – the Key Arts Organisation category is not open for applications. Previously, the annual budget for the category was \$5.3 million.
Northern Territory	Arts NT, within the Department of Tourism, Sport and Culture.	Seven organisations are funded through the Leading Territory Arts Organisations	The seven funded organisations have wide-ranging remits relating to artform and constituents with a notable emphasis on supporting and advocating for regional and Indigenous arts. In response to the Territory context, there are several instances in which similar service delivery is undertaken by	There is not a specific funding stream for service organisations. The Leading Territory Arts Organisations Five Year Funding Agreement provides \$21 million to 23 arts organisations and venues (excluding Museum and Art Gallery of the Northern Territory MAGNT) until 2025.

Jurisdiction	Agency	Service Organisations	Services & Artforms	How are they funded?
		Five Year Funding Agreement.	funded organisations located in Darwin (Tactile Arts) and Alice Springs (Central Craft).	
INTERNATIONAL				
England	Arts Council of England, within the Department for Digital, Culture, Media and Sport.	58 sector support organisations are funded as part of the National Portfolio's 828 arts organisations, museums and libraries.	Structured as stand-alone entities, partnerships and networks, 36 of the organisations are national while 22 have a regions' focus. 24 are not discipline-specific with remits that cover practitioner sustainability, business development, audience engagement and the imparting of arts leadership skills to children and young people.	There is not a specific funding stream for service organisations. National Portfolio (2018-22) sector support organisations can apply for operational funding within the general funding stream and for program funding within a separate Sector Support Organisations stream (€407 million per year).
Canada	Canada Council for the Arts/Conseil des Arts du Canada, within the Department of Canadian Heritage.	22 National Arts Service Organisations are funded through the National Arts Service Organisations stream of the Supporting Artistic Practice program.	These organisations are artform and membership based with some differentiation by language (English, French). Service organisations to the Indigenous sector are included within the 71 organisations funded by the Creating, Knowing and Sharing: The Arts and Cultures of First Nations, Inuit and Metis Peoples program (2018-19 organisations budget \$6.8 million).	There are two three-year funding streams - National Arts Service Organisations and Support Organisations which is for targeted sector development. In 2018-19 (\$30.4 million both streams), an additional 499 organisations received Support Organisations funding. These additional organisations include (not-for-profit) organisations described as providing representation or management services for a stable roster of 3 or more artists, groups or organisations.
New Zealand	Creative New Zealand, within the Ministry for Culture and Heritage.	20 organisations are funded as part of the 80 organisations supported through Creative New Zealand's Investment programs.	These organisations have a remit that combines cultural self-determination, new work development, touring, collaboration between organisations and professional development services. Their number has been increased by 35% in accordance with Creative New Zealand's Investment Strategy Te Ara Whakamua 2018-23, Te Ha o nga Toi - Maori Arts Strategy 2019-24 and Pacific Arts Strategy 2018-2023.	There is not a specific funding stream for service organisations. Commencing from 2020, organisations are funded through the Arts Leadership Investment/Toi Totara Haemata (23 for 2-5 years) and Arts Development Investment/Toi Uru Kahikatea (57 for 1-3 years) programs. The total budget is \$27 million.

Jurisdiction	Agency	Service Organisations	Services & Artforms	How are they funded?
Scotland	Creative Scotland, Scottish Government	18 development organisations are funded as part of the 121 organisations comprising Creative Scotland's Regular Funding Network 2018-21.	Established development organisations are generally artform and language (Scots, Gaelic) based. The number of development organisations has been substantially increased with the addition of organisations such as Arts and Business Scotland, Creative Carbon Scotland, Creative Edinburgh and Creative Dundee which have a creative industries emphasis - in line with Creative Scotland's 10 Year Plan, Unlocking Potential, Embracing Ambition.	There is not a specific funding stream for service organisations. All organisations can apply for Regular Funding, Open Project Funding, Targeted Funding or Funding Delivered by Partners programs. Regular Funding recipients are supported for three years and the Network has a total budget of €101.6 million.
Singapore	National Arts Council, Ministry of Culture, Community and Youth.	52 organisations are funded through the Major Company Scheme and the Seed Grant Fund (two emerging organisations).	These organisations with excellence in artmaking, outreach and/or serving the sector - known as the Artmaking, Bridging and Intermediary Tracks - provide sector support to varying degrees. They have an emphasis on artforms (including traditional) and youth participation. Singapore has little history of artform and membership-based service organisations. The two funded are Singapore Book Council and Singapore Drama Educators Association.	There is not a specific funding stream for service organisations. Organisations which are funded through the Major Company Scheme (2020-22) and the Seed Grant Fund (under review) can also apply for project grants such as the Capability Development Grants which are open to individuals and organisations. In 2020, these two programs have a budget of \$16 million.

5. Appendix: NSW Arts & Cultural Sector Service Needs Survey 2020

Arts Sector Service Needs Survey 2020

Create NSW aims to grow a thriving arts and cultural sector across NSW.

As part of this, Create NSW is looking at how to best support and deliver professional, capacity and sector development services to sector.

Key to this is understanding the services you require to thrive and grow your creative practice.

You are invited to complete this survey – which should take about 10 minutes - so we can better understand your needs.

About you

Are you:

- a) Individual artist (go to blue questions, then to all)
- b) responding on behalf of an arts organisation (go to orange questions, then to all)
- c) responding on behalf of an organisation that provides services to the sector

a) Individual Artist to answer

What is your postcode? _____

Where do you present your art?: (all that apply)

- 1. Metropolitan Sydney
- 2. Western Sydney
- 3. Regional NSW
- 4. Interstate (state)
- 5. Overseas (country)

What is your primary artform: (choose one of)

- 6. Aboriginal Arts and Culture
- 7. Digital Arts
- 8. Music (including Opera and Musical Theatre)
- 9. Collections and Cultural Heritage
- 10. History
- 11. Theatre (including Circus and Physical Theatre)
- 12. Community Arts and Cultural Development
- 13. Literature
- 14. Visual Arts (including Craft and Design)
- 15. Dance
- 16. Multi artform
- 17. Other: (please provide)

How long have you been practising? (choose one of)

- 18. 0-5 years
- 19. 5-15 years
- 20. 15+ years

How would you describe how you work and depend on creative income? (choose one of)

21. Full-time artist, totally dependent on creative income
22. Practising artist who supplements income with other work
23. Not earning an income from my creative practice

Do you identify as Aboriginal? Yes/No/Prefer not to say

Are you from a CALD background? Yes/No/Prefer not to say

Do you have a disability? Yes/No/Prefer not to say

Do you identify as LGBTIQ+?: Yes/No/Prefer not to say

Are you under 25 years old: Yes/No/Prefer not to say

Are you over 60 years old: Yes/No/Prefer not to say

Thinking about your professional practice, please answer the following statements:

24. Compared to 5 years ago, it is getting [1 easier/5 harder] to be in my creative practice
25. Compared to 5 years ago, it is getting [1 easier/5 harder] to earn a living from my creative practice
26. I have [1 excellent/5 no] access to the skills, support and opportunities I need for a thriving creative practice
27. I [1 know well/5 don't know] where to get the advice and guidance to grow my creative practice.
28. I feel [1 strongly/5 not at all] part of a community of creative artists
29. I am in an [1 inspiring and stimulating/5 not inspiring and unstimulating] environment in terms of creative opportunities

b) *Organisation to answer*

What is the postcode where your organisation is based: _____

Where do you present your activities/your art: (all that apply)

30. Metropolitan Sydney
31. Western Sydney
32. Regional NSW
33. Interstate (state)
34. Overseas (country)

What is the primary artform of your organisation: (choose one of)

35. Aboriginal Arts and Culture
36. Digital Arts
37. Music (including Opera and Musical Theatre)
38. Collections and Cultural Heritage
39. History
40. Theatre (including Circus and Physical Theatre)
41. Community Arts and Cultural Development
42. Literature
43. Visual Arts (including Craft and Design)

- 44. Dance
- 45. Multi artform
- 46. Other: please specify _____
- 47. No artform: please specify what your organisation does _____

What is your primary organisational model?

- 48. Arts Centre
- 49. Arts Facility
- 50. Arts Studio
- 51. Community organisation
- 52. Festival
- 53. Gallery
- 54. Local Government
- 55. Major Performing Arts Organisation
- 56. Museum
- 57. NSW Cultural Institution/State Significant Organisation
- 58. Small to Medium Arts Organisation
- 59. Other: please specify

Does your organisation's activities engage with people who are: (tick all that apply)

- 60. Aboriginal
- 61. From a CALD background
- 62. Have disability
- 63. Identify as LGBTIQ+
- 64. Under 25 years old
- 65. Over 60 years old

How long has your organisation been established? (choose one of)

- 66. 0-5 years
- 67. 5-15 years
- 68. 15+ years

How would you describe your organisation's overall artistic and financial health:

- 69. Excellent
- 70. Good
- 71. Reasonable
- 72. Weak
- 73. Poor

Please rate (scale 1-5) the following statements:

- 74. Compared to 5 years ago, it is getting [easier/harder] for this organisation to operate.
- 75. The people in this organisation have [excellent/no] access to the skills, support and opportunities needed for a thriving organisation.
- 76. I [do/don't] know where to get the advice and guidance to grow the organisation.
- 77. I feel this organisation is [strongly connected/not at all connected] to a community of creative artists and arts workers.
- 78. This organisation is in an [inspiring and stimulating/not inspiring and unstimulating] environment in terms of creative opportunities

c) Service Organisations to answer

What is the postcode where your organisation is based: _____

Where do you offer your services? (tick all that apply)

- 79. Metropolitan Sydney
- 80. Western Sydney
- 81. Regional NSW
- 82. Interstate (state)
- 83. Overseas (country)

Are the services provided by your organisation specifically for professional artists? Yes/No

Does the organisation provide arts-related services for the public and general community?
Yes/No

Does your organisation's activities engage with people who are: (tick all that apply)

- 84. Aboriginal
- 85. From a CALD background
- 86. Have disability
- 87. Identify as LGBTIQ+
- 88. Under 25 years old
- 89. Over 60 years old

How long has your organisation been established? (choose one of)

- 90. 0-5 years
- 91. 5-15 years
- 92. 15+ years

How would you describe your organisation's service capacity? (choose one of):

- 93. Excellent
- 94. Good
- 95. Reasonable
- 96. Weak
- 97. Poor

How would you describe your organisation's financial health? (choose one of):

- 98. Excellent
- 99. Good
- 100. Reasonable
- 101. Weak
- 102. Poor

Please rate (scale 1-5) the following statements:

- 103. Compared to 5 years ago, it is getting [easier/harder] for this service organisation to operate.
- 104. Compared to 5 years ago, it is getting [easier/harder] for this organisation to generate the income it needs.
- 105. The people in this organisation have [excellent/no] access to the skills, support and opportunities needed for a thriving organisation.

106. I feel this organisation is [strongly connected/not at all connected] to a community of creative artists and arts workers.
107. I feel [very positive/very negative] about the organisation's future.

For the following question, depending on the nature of the question that is, 'Agreement to 'Disagreement' or 'Important to Not Important', the following Likert scales were used:

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
Extremely important	Very important	Moderately important	Slightly important	Not at all important

For a) artists and

b) arts organisations to answer

NSW Service Organisations provide specialist services to the NSW arts sector such as advocacy, capacity building, communications and support. Create NSW provides funding to organisations that self-identify as Service Organisations, these are:

- 108. Accessible Arts
- 109. Museums and Galleries of NSW Ltd
- 110. Australian Dance Council Ausdance NSW Inc
- 111. Music NSW Inc
- 112. Arts Law Centre of Australia
- 113. Regional Arts NSW Ltd
- 114. Royal Australian Historical Society
- 115. NSW Writers' Centre Inc
- 116. Arts on Tour - NSW Ltd
- 117. Playwriting Australia
- 118. Octapod Association Inc
- 119. National Association for the Visual Arts Ltd
- 120. Band Association of NSW
- 121. Rumpus Skillshare

Note: There are a number of other organisations providing specific services to the arts sector within their broader operations and do not identify as Service Organisations.

122. How important are the following services for your/your organisations creative and financial health NOW?
- a. Professional Support, Information and Communications
 - b. Industry Leadership, Solidarity and Advocacy
 - c. Skills development and capacity building

- d. Access to professional advice and expertise such as legal, financial, marketing and technology etc
- e. Networks and contacts
- f. Brokering of partnerships, agreements, tours, creative opportunities
- g. Artist/Organisation promotion
- h. Insurance
- i. Grant opportunities
- j. Employment/contract opportunities
- k. Auspicing/administrative support for grants management
- l. Finding affordable space for making and presenting
- m. OTHER: Please specify_____

2. Do you have access to these services? Yes/No

What service organisation provides these services? _____

How are you accessing these services? Please tick all that apply:

- a. Online
 - b. In person
 - c. Over the phone
 - d. By email
 - e. By webinar
 - f. Through guides and toolkits
 - g. In group sessions, seminars, workshops
 - h. Through regular communications (such as e-newsletter)
- e. What type of affiliation do you/your organisation have with the service organisation providing these services?
- a. Paid membership (eg annual membership fee)
 - b. Free-of-charge subscriber (eg to regular communications)
 - c. Follower on social media
 - d. Not a member, subscriber or follower
 - e. Other: please describe_____
- f. If you do not have access to these services, what are the barriers preventing you? The services are:
- a. Not provided
 - b. Not provided in my location
 - c. Too expensive
 - d. Too difficult to access
 - e. Provided but are not tailored to my requirements, practice or situation
 - f. Unsure
 - g. Not applicable

The following is a list of more specific services you might need to grow your creative practice/organisation. Please rate how important it is to have access to these services:

- a. Understanding First Nations engagement and protocols
- b. Engaging with specific communities, such as:
 - a. Culturally and Linguistically Diverse (CALD)
 - b. people with disability
 - c. LGBTIQ+
 - d. Regional audiences
 - e. Western Sydney audiences

- f. Sydney Metropolitan audiences
- g. Young people
- h. Seniors
- c. Looking after the wellbeing and mental health of the artists I work with, my teams and my own
- d. Implementing effective workplace health and safety measures
- e. Accessing Industry standards
- f. Understanding best practice in my field
- g. Negotiating, mediation and resolving conflict
- h. Developing better governance, strategic and business planning
- i. Thriving financially
- j. Generating more income
- k. Selling my work
- l. Being entrepreneurial
- m. Reaching more audiences
- n. Improving marketing and promotion
- o. Developing better public communications: eg use social media more effectively
- p. Touring regionally, nationally and internationally
- q. Developing international networks and engagement
- r. Finding a mentor/being a mentor
- s. Offering Awards and Prizes
- t. OTHER: Please specify _____
- u. Unsure
- v. None

What services do you think you might need IN THE FUTURE (over the next 10 years) to support you/your organisations creative practice and development?

Open-ended: _____

How would you prefer to access these services?

Open-ended: _____

Do you have any general comments about services you require?

THANK YOU

For Service Organisations to answer:

- w. How important do you think these services are for the creative and financial health of the artists and arts organisations NOW?
 - a. Professional Support, Information and Communications
 - b. Industry Leadership, Solidarity and Advocacy
 - c. Skills development and capacity building
 - d. Access to professional advice and expertise such as legal, financial, marketing and technology etc
 - e. Networks and contacts

- f. Brokering of partnerships, agreements, tours, creative opportunities
 - g. Artist/Organisation promotion
 - h. Insurance
 - i. Grant opportunities
 - j. Employment/contract opportunities
 - k. Auspicing/administrative support for grants management
 - l. Finding affordable space for making and presenting
 - m. OTHER: Please specify _____
- b. Which of these services does your organisation provide for the arts sector?
- c. How is the organisation providing these services? Please tick all that apply:
- a. Online
 - b. In person
 - c. Over the phone
 - d. By email
 - e. By webinar
 - f. Through guides and toolkits
 - g. In group sessions, seminars, workshops
 - h. Through regular communications (such as e-newsletter)
- d. What type of affiliation does your organisation offer to artists and arts organisations?
- a. Paid membership (eg annual membership fee)
 - b. Free-of-charge subscriber (eg to regular communications)
 - c. Follower on social media
 - d. Not a member, subscriber or follower
 - e. Other: please describe _____
- e. How could your organisation grow its service offering to the sector?:
- a. Providing new and different services
 - b. Providing services in more locations
 - c. Reducing the cost of services
 - d. Providing services accessible and tailored to all requirements, practice or situation
 - e. Unsure
 - f. Not applicable
 - g. Other: please describe _____
- f. What are the barriers preventing the organisation growing its service offering (choose top 3)?:
- a. Data and research to identify needs
 - b. Geographic spread and engagement
 - c. Ability to raise more income
 - d. Staff capacity and expertise
 - e. Technological capability
 - f. Unsure
 - g. Not applicable
 - h. Other: please describe _____
- g. The following is a list of more specific services that could support the development of the artists and arts organisations. Please rate how important you think it is to provide these services:
- a. Understanding First Nations engagement and protocols
 - b. Engaging with specific communities, such as:
 - i. Culturally and Linguistically Diverse (CALD)

- ii. people with disability
- iii. LGBTIQ+
- iv. Regional audiences
- v. Western Sydney audiences
- vi. Sydney Metropolitan audiences
- vii. Young people
- viii. Seniors
- c. Looking after the wellbeing and mental health of the artists and teams
- d. Implementing effective workplace health and safety measures
- e. Accessing Industry standards
- f. Understanding best practice
- g. Negotiating, mediation and resolving conflict
- h. Developing better governance, strategic and business planning
- i. Thriving financially
- j. Generating more income
- k. Selling work
- l. Being entrepreneurial
- m. Reaching more audiences
- n. Improving marketing and promotion
- o. Developing better public communications: eg use social media more effectively
- p. Touring regionally, nationally and internationally
- q. Developing international networks and engagement
- r. Finding a mentor/being a mentor
- s. Offering Awards and Prizes
- t. OTHER: Please specify _____
- u. Unsure
- v. None

What services do you think artists and arts organisations you might need IN THE FUTURE (over the next 10 years) to support creative practice and development?

Open-ended: _____

How could these services be accessed?

Open-ended: _____

Do you have any general comments the provision of services?
