



Arts Council England

The Investment Principles Plan

2023-2026 Investment Programme



Easy read booklet

Who we are and what we do



We are **Arts Council England**. We give money to help artists and arts organisations do **creative work** and make art and culture.



Creative work is when you use your imagination to think of new ideas or make new things. You can use your creativity to make arts and culture.



Theatre

Arts and culture includes

- music.
- dance.
- theatre.
- museums.
- libraries.



One way we help is by giving people and organisations money. This is called **funding**.

What this booklet tells you about



When we give your organisation funding, we set up a **Funding Agreement** with you. It says how much money we will give you and the rules you need to follow.



1 rule says you need to fill in and send us 3 forms every year.

3



The 3 forms are

1. The Financial Template.
2. The Investment Principles Plan.
3. The Activity Plan.



In this booklet we tell you about **The Investment Principles Plan** and how to fill it in.

What The Investment Principles Plan is and why we use it



In **The Investment Principles Plan** you tell us how your organisation will use our 4 **Investment Principles**. [Click this link to see The Investment Principles Plan.](#)

LET'S
CREATE

Our **Investment Principles** are what we believe in. We wrote a plan called **Let's Create** that tells you about them. [Click this link to read Let's Create](#)



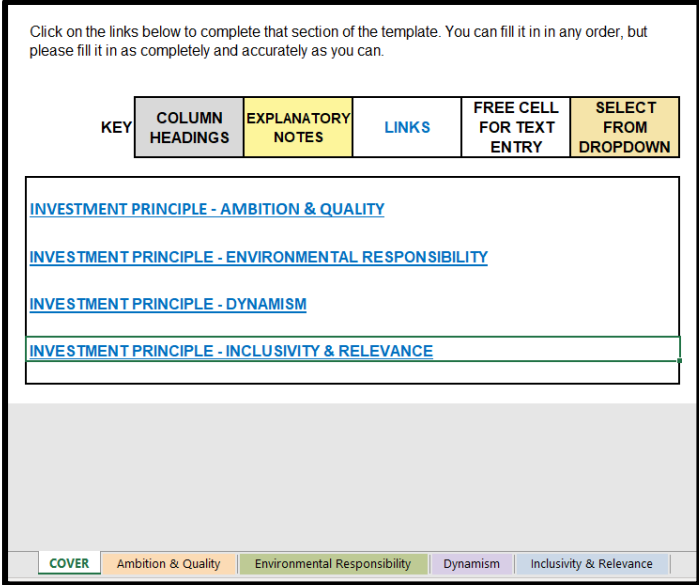
We use **The Investment Principles Plan** to make sure we get the same information from every organisation we give funding to.



It helps us understand the activities we are funding and what you want your activities to do.

What The Investment Principles Plan looks like

The first page looks like this. You do not fill anything in.



There are 4 tabs at the bottom. Use these to move to the other 4 pages. There is a page for each Investment Principle.

The Investment Principles pages look like this

RETURN TO CONTENTS		INVESTMENT PRINCIPLES PLAN – AMBITION & QUALITY – 2024/25					
YOUR 3-YEAR AMBITION				YOUR 12-MONTH PRIORITIES			
Tell us about your ambition for this Investment Principle and the success measures you will use to help you know you've achieved your goals by the end of the investment period				What will you prioritise over the coming 12 months to put you on a path to achieving your 3 year ambition			
Add a maximum of 3 key actions into each category and then select the stage of development your actions are at currently. Click into the cell to use the dropdown.				STAGES PLANNED - Discussed and agreed but not yet actioned IN PROGRESS - Agreed with demonstrable actions under way ESTABLISHED - Part of your work and progress is being tracked			
ACTIONS	Current stage (select from dropdown)	Expected stage at year end (select from dropdown)	Q1 - notes on progress	Q2 - notes on progress	Q3 - notes on progress	Q4 - notes on progress	
SKILLS DEVELOPMENT							
The							

**COLUMN
HEADINGS**

Grey boxes are headings.
You cannot change these.

**EXPLANATORY
NOTES**

Yellow boxes give you information.
You cannot change these.

LINKS

White boxes with blue writing are
links. Use these to move around the
form. You cannot change these.

X

You cannot make changes to
boxes with a cross in them.

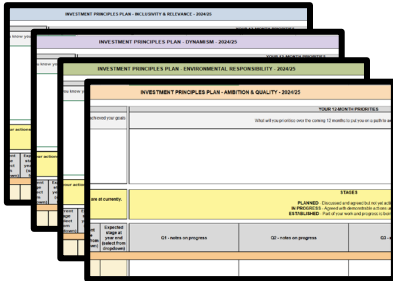
**SELECT FROM
DROPDOWN**

Click on **beige** boxes to see a list of
options you can choose from.

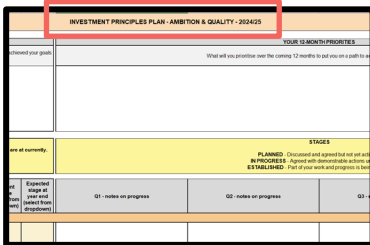
**TYPE
HERE**

You can type in the **white** boxes.

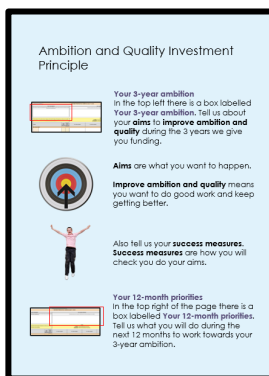
What you need to fill in



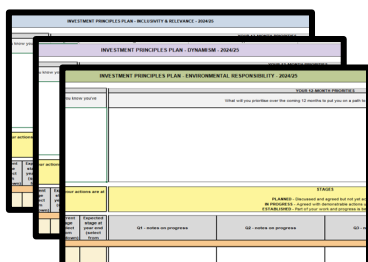
You must fill in 1 page for each of the 4 Investment Principles. This means you fill in 4 pages in total.



Each of the 4 Investment Principles pages are the same apart from the heading.

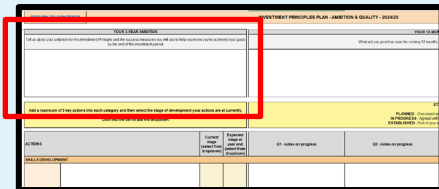


We tell you how to fill in the page for our Investment Principle called **Ambition and Quality** on the blue pages of this booklet.



Use this information to help you fill in the pages for the other 3 Investment Principles too.

Ambition and Quality Investment Principle



A screenshot of a form titled 'INVESTMENT PRINCIPLES PLAN - AMBITION & QUALITY - 2020/21'. The form is divided into several sections. A red box highlights the 'YOUR 3-YEAR AMBITION' section, which is currently blank. Below this section, there are sections for 'YOUR 12-MONTH PRIORITIES' and 'YOUR SUCCESS MEASURES', also highlighted with red boxes. At the bottom of the form, there are columns for '12-MONTH PRIORITIES', '12-MONTH PRIORITIES', and '12-MONTH PRIORITIES'.

Your 3-year ambition

In the top left of the page there is a box called **Your 3-year ambition**. Tell us about your **aims** to **improve ambition and quality** in the 3 years we give you funding.

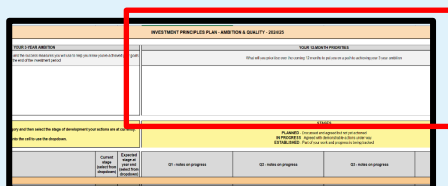


Aims are what you want to happen.

Improve ambition and quality means you want to do good work and keep getting better.



Also tell us your **success measures**. **Success measures** are how you will check you do your aims.



A screenshot of the same form as above, but with a red box highlighting the 'YOUR 12-MONTH PRIORITIES' section, which is currently blank. The 'YOUR 3-YEAR AMBITION' and 'YOUR SUCCESS MEASURES' sections are also visible and highlighted with red boxes.

Your 12-month priorities

In the top right of the page there is a box called **Your 12-month priorities**. Tell us what you will do in the next 12 months to work towards your 3-year ambition.

Actions

There are 4 sections under **Actions** called

- **Skills Development**
- **People and Representation**
- **Planning**
- **Tools and Monitoring.**

Add a maximum of 3 key actions into each category and then select the stage of development your actions are at currently.
Click into the cell to use the dropdown.

Read the yellow boxes then fill in your information for all 4 sections.

In **column 1** for each section, tell us what you will do to meet your 12-month priorities and to work towards your 3-year ambition. We call these your **actions**.

Each section looks like this.

Column 1 Column 2 Column 3

ACTIONS	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7
SKILLS DEVELOPMENT				☺ ... notes on progress	☺ ... notes on progress	☺ ... notes on progress	☺ ... notes on progress
PEOPLE AND REPRESENTATION							
PLANNING							
TOOLS AND MONITORING							

Column 4 Column 5 Column 6 Column 7

INVESTMENT PRINCIPLES PLAN - AMBITION & QUALITY - 2024/25			
YOUR 12-MONTH PRIORITIES		YOUR 12-MONTH PRIORITIES	
What will you prioritise over the coming 12 months to put you on a path to... 3 actions			
STAGES		STAGES	
PLANNED: Discussed and agreed but not yet... IN PROGRESS: Agreed and demonstrable... ESTABLISHED: Part of your work and progress is...		PLANNED: Discussed and agreed but not yet... IN PROGRESS: Agreed and demonstrable... ESTABLISHED: Part of your work and progress is...	
Q1 - notes on progress	Q2 - notes on progress	Q3 -	Q4 -

Tell us about up to 3 actions in each of the 4 sections.



For example:

- **Skills Development** actions might include training for your staff.



- **People and Representation** actions might include how you will get different types of people to work for you.



- **Planning** actions might include aims that the people in charge of your organisation agree to.



- **Tools and Monitoring** actions might include checks you do to make sure your work is good.

Current stage (select from dropdown)	Expected stage at year end (select from dropdown)
Planned	
In progress	
Established	

From the list in **column 2** tell us the stage each action is at now. It can be

- **Planned**
- **In progress**
- **Established.**



Planned means you have talked about it and you know what you will do, but you have not started yet.



In progress means you know what you will do, and you have started your action.

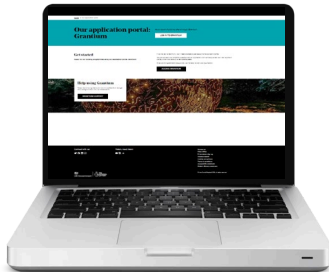


Established means you do your action and check it to make sure it is going well and that you meet your aims.

Current stage (select from dropdown)	Expected stage at year end (select from dropdown)	Q1
Planned		
In progress		
Established		

From the list in **column 3** tell us the stage you think your action will be at the end of the first year we give you funding.

What to do with The Investment Principles Plan



When you finish The Investment Principles Plan, upload it to our online system on our website called **Grantium**.
[Click this link to go to Grantium](#)






The Investment Principles Plan is 1 part of the information you need to send us to get funding in April 2024.



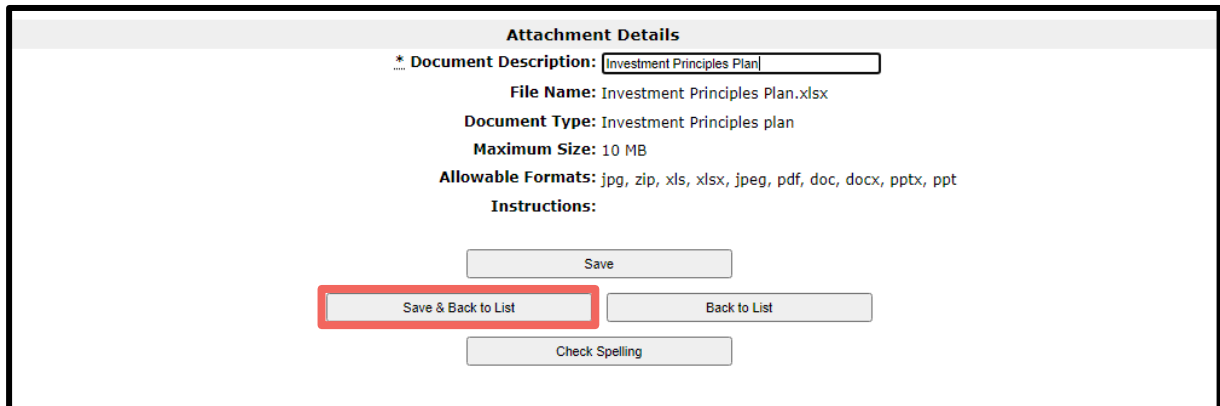
To upload it click on the blue link called **Investment Principles Plan**.

The Grantium page looks like this

Document Type	Required?	Description	Date attached	Download
1. Activity Plan	Yes	Activity plan		
2. Investment Principles plan	Yes	IP plan		
3. Financial document	Yes	Financials		

This e-Form has been submitted

You will then go to a page that looks like this



Attachment Details

* Document Description:

File Name: Investment Principles Plan.xlsx

Document Type: Investment Principles plan

Maximum Size: 10 MB

Allowable Formats: jpg, zip, xls, xlsx, jpeg, pdf, doc, docx, pptx, ppt

Instructions:

Save

Save & Back to List

Back to List

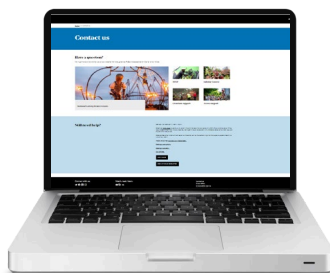
Check Spelling



Click the button that says **Save & Back to List**.



You can then carry on using Grantium to fill in your other forms.



If you need help to use Grantium [click this link to see how you can contact us](#).

How to update The Investment Principles Plan every 3 months

April 2024	July 2024
October 2024	January 2025

You will need to submit The Investment Principles Plan in April. You then need to update your board about your activity every 3 months. You can use the template for this.

STAGES			
PLANNED - Discussed and agreed but not yet actioned			
IN PROGRESS - Agreed with demonstrable actions under way			
ESTABLISHED - Part of your work and progress is being tracked			
Q1 - notes on progress	Q2 - notes on progress	Q3 - notes on progress	Q4 - notes on progress

Use columns 4 to 7 to say what you have and have not done for your actions and your aims.



If you do not think you will meet your aims, you need to tell us about this and tell us the changes you will make so you do better.

Q1 →

April 2024	June 2024
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Fill in the column with Q1 in the title with your information about April to June 2024. Then fill in the next columns every 3 months.



Thank you to A2i for the words
www.a2i.co.uk (reference 38682)

The full version of this document is called
**“How to Guide: The Investment Principles Plan
for 2023-26 Investment Programme 2024/25”**