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Catalyst: Evolve

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Executive summary

Catalyst: Evolve was a £17.5 million programme which ran between July 2016 and August 2019. It supported 160 arts organisations across England to unlock private income. The investment was awarded to 139 recipients, representative of the 160 organisations, as a number of the organisations were members of consortia. Catalyst: Evolve grantees were mainly small in size, based outside London and had a limited track record of fundraising.

Catalyst: Evolve builds on Catalyst Arts, a larger programme which ran between 2012 and 2015. The programme had three aims: 1) develop fundraising skills, competences and, ultimately, capacity; 2) raise private income to support grantees' business models; and 3) build knowledge and expertise about good practice in cultural fundraising. Both programmes are part of Arts Council England's policy to help the sector develop a more mixed economic model, based on public funding, earned income and private income.

Subsequent to evaluating Catalyst Arts, BOP was commissioned by Arts Council England to carry out the evaluation of Catalyst: Evolve. Our research ran from October 2016 to June 2020. It assessed the effectiveness of the programme and also facilitated sector learning through coaching and communicating effective fundraising lessons. The evaluation has included case studies, surveys, learning events, and analysis of programme management data. The evaluation has also included reporting the findings back to the sector. Communication material produced to do this includes blogs, video case studies, podcasts, and infographics, as well as written reports and case studies. The full final report as well as other publications can be found [here](#).

What key lessons can we draw overall?

There is a clear pathway of change – which applies to organisations of all sizes, locations and artforms – that enables them to unlock private income and Catalyst has consistently supported this journey for the last six years

The biggest positive impact on the grantees has been the uptake of fundraising activity and the subsequent organisational change that has been put in place. Unlocking private income can be done and our research has identified a real 'pathway of change' for organisations that are looking to improve their fundraising efforts. Both the current and previous evaluation have identified a commonly occurring set of activities undertaken by organisations in pursuing this goal, which then typically lead to recurring processes of organisational change. These activities and changes have been formalised in the logic model used for the two evaluations.

Relatedly, there is a set of good practices in common that can apply to organisations of all kinds

We have found consistent evidence of how a series of 'good practices' underpin successful private fundraising. What is the learning from these good practices? This is explored through 37 *Catalyst Stories*, each one describing a different Catalyst journey across a varied range of organisations. While there is no 'one size fits all' model for private fundraising in the arts, the research has identified a common series of good practices and useful approaches:

- Creating a strong mission and vision and case for support
- Establishing a fundraising strategy with clear objectives
- Developing fit-for-purpose governance
- Engaging the entire organisation, including organising away days and internal meetings with all parties involved (e.g. finance team, boards)
- Investing in training at all levels (e.g. front of house/board training)
- Recruiting and hiring new members of staff or board members with fundraising skills
- Accessing external expertise (e.g. conferences/consultants)
- When relevant, developing membership schemes and customer relationship management (CRM) systems

- Undertaking donor research and cultivating relationships before making the ask.

Unlocking private income takes time

While the programme did also help organisations to raise private income, as we outline in greater detail below, financial change is happening at a slower pace than organisational change. This is not surprising. Unlocking funds from the private sector and transitioning towards a more mixed economic model require medium to long-term timeframes and will require organisations to continue to keep up their good work and invest in fundraising. Encouragingly, most grantees are planning to either maintain the resources they now allocate to fundraising or increase the resources they allocate to fundraising in the immediate future.

Organisations are looking to collaborate, share and help each other

Organisations of all sizes, and especially the small to medium sized ones, are looking to collaborate and connect to each other. BOP has run 12 regional and national learning events. These events have been well attended and grantees continuously expressed how sharing learning and discussing with their peers helped them to better understand and progress towards unlocking private income.

Programme design: A successful formula

The programme design has featured the use of capacity building grants alongside match funding and this combination has been demonstrated to be very helpful to organisations. We consistently found that grantees were able to experiment right from the beginning and that match funding was a great incentive for private donors. In this sense, the two programmes have created an example of how arts funders can support organisations to help themselves transition towards a more mixed financial model for culture.

What if the programme had not been put in place?

Grantees reported that, without being part of the programme, they would have not embarked on the same process of change. For most of the organisations that responded to the survey (53%), they attributed Catalyst: Evolve's impact to

lie in accelerating shifts in their revenue mix that were already underway. Only 15% reported that the programme had no impact on their mix of revenues.

That the observed changes across the grantees can be attributed to the impact of the Catalyst: Evolve programme, and would not have happened in any case, is further strengthened when looking at a small number of organisations that applied for the programme but were not selected. The fundraising journeys of these 'counterfactual' organisations over the last three years showed that – without Catalyst support – they have largely lacked the time and human resources to properly develop and implement their fundraising strategies.

What kind of external factors could influence the lasting impact of the programme and how so?

It remains to be seen to what extent this impact will be a long-lasting one. The adversity of external conditions – including the economic consequences of the pandemic, the uncertainty surrounding the UK's future trading relationship with the European Union, the residual effects of austerity, as well as the limited pool of private givers to the arts in England – all pose a risk of diminishing the positive impact of Arts Council's Catalyst policy.

Aim 1 findings: Fundraising competences, skills and capacity

In line with programme objectives, Catalyst: Evolve did indeed enable an important process of organisational change among its grantees – from building ownership of their fundraising strategy, to developing positive attitudes towards fundraising.

Fundraising strategy

In particular, 76% of organisations now share their fundraising strategy with the whole organisation, 59% stated the entire organisation is now delivering the fundraising strategy and 44% have revised their mission and vision statement during the programme.

Confidence and awareness of good practice

The groundwork laid by grantees eventually led to a broader set of organisational changes including:

— Increased confidence

- 91% reported greater confidence in fundraising
- 88% can now better communicate they are a charity that needs support
- 86% now have a more proactive approach to fundraising
- 68% reported improved relationship management with donors
- 54% felt more empowered when negotiating with donors

— Awareness of good practice and willingness to innovate

- 80% reported their understanding of donor motivations is enhanced
- 79% were more aware of the importance of fundraising
- 79% were now more inclined to experiment with new strategies.

Fundraising capacity

Fundraising capacity has grown at all levels. Of the grantees that responded to the Year 3 survey, our research shows all grantees had recruited, or tried to recruit, at least one staff or board member in order to increase their fundraising capacity. Of these, 42% hired a new manager with fundraising skills, 33% a new board member, 29% a new assistant, and 10% a new director. Nevertheless, in both Year 2 and 3 the evaluation has provided evidence that grantees have found it challenging to attract and recruit members of staff with fundraising expertise, across all regions.

As a result, organisations have learned to share responsibilities for fundraising across all staff members, rather than responsibility lying with one single fundraiser. This has helped to establish a culture of fundraising within the organisation, which is a very important outcome – one that is flagged as a critical factor of success by broader theory and research in fundraising.¹

Engaging the board of trustees

Catalyst: Evolve also helped many grantees to facilitate fundraising discussions at board level in order to engage trustees in unlocking private income. These discussions often led to very positive results. Of the grantees that responded to the Year 3 survey, 83% stated that the board of trustees were now confident in fundraising (+41 points since programme start). Further, 48% reported that the board of trustees was now engaged in delivering the fundraising strategy. However, as this last statistic illustrates, around one half of boards are still not fully engaged and our research consistently showed that grantees have faced a common set of challenges in this respect. These include: little knowledge or understanding of fundraising plans; difficulties in convincing the board to give to the organisation; a reluctance by trustees to ask for money; a reluctance to accept fundraising as part of their responsibility; and difficulty with attracting board members with fundraising skills.

Cost-benefit of fundraising activity

By the close of the programme, fundraising activities were cost-positive for 71% of grantees that responded to the survey. This was a 37 percentage point increase from the start of the programme, when only 34% reported that their fundraising activities were cost-positive. These results reinforce the findings from the previous Tier 2 and Tier 3 Catalyst Arts grantees, who reported a 31 point increase (at the end of the Catalyst Arts programme, activities were cost-positive for 76% of grantees).

In both phases of the Catalyst programme, greater cost effectiveness has been achieved despite adding more to the cost side of the equation in terms of more staff resources and spending on other items such as campaigns, events and customer relationship management (CRM) systems. Clearly, this indicates that while more money is spent on fundraising, this has been more than matched by the increase in fundraising income that has been achieved through implementing these changes.

¹ Cynthia M. Gibson (2015) *Beyond fundraising: what does it mean to build a culture of philanthropy?* Evelyn & Walter Haas Jr Fund. https://www.haasjr.org/sites/default/files/resources/Haas_CultureofPhilanthropy_F1_0.pdf

Aim 2 findings: raising private income and improving business models

Overall revenue mix

Financial change is beginning to happen for Catalyst: Evolve grantees. However, this is unsurprisingly happening at a slower pace than the organisational change reported above. Unlocking private income is a long-term process and therefore it is hard to generate immediate results within a limited timeframe. Considering the overall revenue mix of grantees, our research shows that philanthropy as a share of overall revenues increased by +3 points to 16%, and sponsorship increased by +1 point to 2%.

This is a very similar picture to the previous Catalyst Arts programme, in which organisations reported a +4 point increase in philanthropy and +2 point in sponsorship. However, the increase in the share of philanthropy is a small change and, combined with the relatively small sample size (in absolute terms), it means that this observed difference, in this case, is not statistically significant.

Individual giving

Since the start of the programme, the number of organisations targeting individual giving has almost doubled. This was a key aim of the programme and it also seems to have had an effect on revenues: for grantees that responded to the Year 3 survey, individual giving has grown as a share of private income by 4 points since project start. Organisations that secured support from individuals often seem to have a longer track record of fundraising, including prior experience of fundraising from individuals.

Corporate

Corporate income was consistently flagged as the most challenging income category. Year 3 survey data shows only a 1 percentage point increase in these revenues, despite 66% of grantees that responded to the survey reporting that they had targeted corporate income through the programme. Grantees that did manage to raise funds from within this category typically had previous existing relationships with businesses.

Trusts and foundations

Almost all of the grantees that responded to the survey (90%) were regularly targeting private trusts and foundations before the programme started. Despite the pre-existing strong engagement of grantees with trusts and foundations, even more of these grantees had targeted this source of revenue by the end of the programme (98%). Relatedly, some grantees reported having reached 'saturation' point in terms of trust and foundation revenues. However, there was other evidence that showed that:

- grantees with a more limited track record of fundraising successfully applied to new (and bigger) trusts and foundations; and
- more experienced grantees were able to strengthen existing relationships and forge new ones, reporting feeling more confident and empowered as a result of the programme.

Overall success rates

Our analysis shows that, of the grantees that responded to the Year 3 survey, they had only a 20% success rate in terms of converting the new donors that were targeted. This is a relatively low success rate. It might be due to a number of reasons, including: the challenging nature of the macro economic environment; the increasing demand for, and limited pool of, donors giving to the arts; and the organisational profile of grantees, which according to the programme guidelines, had to only have had a previously limited track record of fundraising to qualify as a grantee.

Private income raised overall

The analysis of private income raised paints an overall positive picture. £11.1 million was raised in new private income by the grantees. This enabled them to draw down 90% of the £12.3 million of match funding that was available from the Arts Council, with 71% of grantees having raised 100% of their private income target. These results suggest that the match funding targets set at programme start were appropriate, and also that the programme was indeed successful in enabling grantees with only a limited prior track record of fundraising to improve upon this as a result of the programme.

Private income raised by artform

Combined arts organisations raised more than a quarter of the total income across the cohort (26%) but they also accounted for almost a quarter (24%) of the grantees. At the opposite end, while literature organisations only raised 5% of the total private income raised, they only accounted for 4% of the grantees.

In terms of the average amount fundraised by each artform, dance organisations generated the highest average (£92,621), though as with literature (which had the next highest average of (£84,395), these two artforms only covered a small number of organisations each (nine and six grantees respectively). Collectively, it was theatre that ‘underperformed’ the most in terms of artform, and this was not a result that was affected by there being only a small number of theatre grantees (there were 28).

Do size and geography matter in this instance?

The major finding in this respect is that the grantee experiences varied less in Catalyst: Evolve than in the first Catalyst Arts programme. The main reason for this is that the Evolve cohort was more homogenous than the first Catalyst cohort. Grantees were overwhelmingly very small arts organisations (76% of all grantees only had between 0-24 full-time equivalent employees, and 93% were either micro or small organisations). This means that the Evolve cohort looks less like the wider arts sector than the former Catalyst Arts cohort did (there were no large organisations at all in the programme and few medium-sized ones). This consequently means that it is not possible to easily extrapolate the findings from this evaluation to the wider arts sector regarding the effect of these structural characteristics on the ability of organisations to fundraise.

How successful was the programme in supporting organisational resilience?

Catalyst: Evolve was explicitly designed to support those arts organisations that historically have struggled the most with fundraising or have engaged with it the least. Therefore, in targeting inexperienced and small organisations as grantees, the Arts Council has definitely not supported any ‘low hanging fruit’; quite the opposite.

Our Year 1 and 2 evaluations documented how the organisations that have participated in Evolve started from a lower base and have had to build fundraising strategies and implement organisational change with generally fewer resources and knowhow. This current Year 3 evaluation shows how hard the organisations have found making the ask, with only a 20% success rate for the new individual donors that were targeted through the programme.

Yet despite having these challenges, the financial data analysed in Year 3 suggests that the grantees have proved to be relatively resilient to date. Overall average turnover has increased by over 25% and the data strongly suggests that there has been a small shift towards philanthropy in the mix of revenues grantees have generated, and a small average increase in absolute financial terms.

In summary, the negative trends in the wider economy and public spending over the duration of the Catalyst: Evolve programme, combined with entrenched imbalances in private giving in the arts (see chapter 8), suggest that without their Catalyst activities, the grantees would have struggled more in this difficult operating environment. Catalyst: Evolve’s success or otherwise should therefore be judged on ‘distance travelled’ by the organisations, as well as by absolute measures of financial success.

1. Introduction

1.1 Overview

In November 2016, Arts Council England commissioned BOP Consulting to carry out an independent evaluation of the Catalyst: Evolve programme.

Run between July 2016 and August 2019, Catalyst: Evolve was a £17.5 million programme that supported 160 arts organisations across England to unlock private fundraised income. The investment was awarded to 139 recipients, representative of the 160 organisations, as a number of the organisations were members of consortia. Organisations supported through this programme were very small in size, mostly based outside London and had a limited track record of fundraising.

Catalyst: Evolve built on a previous, larger programme, Catalyst Arts. Run between 2012 and 2015, Catalyst Arts was a £100 million programme launched by Arts Council England and the Heritage Lottery Fund, supporting over 400 organisations across England, including large, medium and small-sized arts organisations. BOP's evaluation of Catalyst: Evolve builds on our evaluation of the previous programme.

The current evaluation is designed to a) assess the impact of the fund against its aims, b) explore good practice in cultural fundraising, and c) facilitate peer-to-peer learning. This Year 3 report is the third and final publication of the Catalyst: Evolve evaluation.

1.2 Catalyst: Evolve: programme description and aims

The cultural sector in England is transitioning to a more mixed economic model of support for culture, of which 'private income' is an important part. Private income – in the context of the programme and the evaluation – is used as shorthand to refer to income that is generated through fundraising and sponsorship activities, of which the donors are individuals, trusts and

foundations, or businesses. The term is not used here to include any traded or earned income (such as from tickets sales, merchandising, retail, food and drink or event hires, etc), nor any form of debt, equity or investment finance. We provide a definition of key terms below. Catalyst: Evolve was designed specifically to support organisations with a limited track record of fundraising to develop competences and skills in these areas and therefore become more resilient. To recap, the Catalyst: Evolve programme aims to:

1. Develop fundraising skills, competences and ultimately, capacity
2. Raise private income to support grantees' business models
3. Build knowledge and expertise about good practice in cultural fundraising

How exactly did the programme do this? The programme included two main components:

- A capacity building grant, for organisations to invest in activities and processes that enable them to 'gear up' to the fundraising challenge and develop the necessary internal resources to attract private income. Typical activities at this stage included signing up to dedicated training courses, appointing a fundraising manager, or sharing a fundraising plan.
- Match-funding, to incentivise grantees' willingness to *ask* and private supporters' willingness to *give*. Match funding means that private income raised by grantees was matched by Arts Council England on a pound-to-pound basis.

The design of Catalyst: Evolve built on the previous Catalyst Arts programme, while also being informed by feedback provided by grantees via BOP's previous independent evaluation. The modifications made to the programme in its second iteration included: extending support to less experienced organisations; taking a broader approach to private income by including corporate support (this was not eligible for match funding in Catalyst Arts); and simplifying the match funding mechanism.

1.3 Evaluation aims and research methods

Three sets of questions were set by Arts Council England in the brief for the evaluation:

- Distributional research questions: identify the impact of Catalyst, including any trends according to organisational characteristics (e.g. size, artform, stage of development, organisation type, etc)
- Diagnostic/learning questions: What were the key challenges and successes? Which tools and approaches seemed most effective, in which context? What factors enabled or hindered culture change? Were there any other factors that supported/hindered progress in fundraising? What legacy was left by the programme?
- Dissemination/policy questions: How transferable are the lessons learned? Are there any lessons for the Arts Council in improving investment in fundraising?

The evaluation was therefore designed to:

- Understand how the programme helped organisations progress towards the programme's aims**, and what activities and processes of financial and organisation change took place to realise these aims. Relevant activities and processes are visualised in the logic model below and specific evaluation questions are highlighted in the table in Appendix 9.1.
- Facilitate sector learning through coaching and promoting good practice in arts fundraising**. This is being carried out through learning events and through sharing the outputs of the evaluation in written, video and audio formats.

Looking beyond sharing best practices and the activities and outcomes that were achieved by grantees, this final report also looks at wider factors that may also have made a contribution to the observed outcomes of the grantees. These wider, contextual factors include the overall state of the economy, public funding for the arts, and general trends in private giving to the arts.

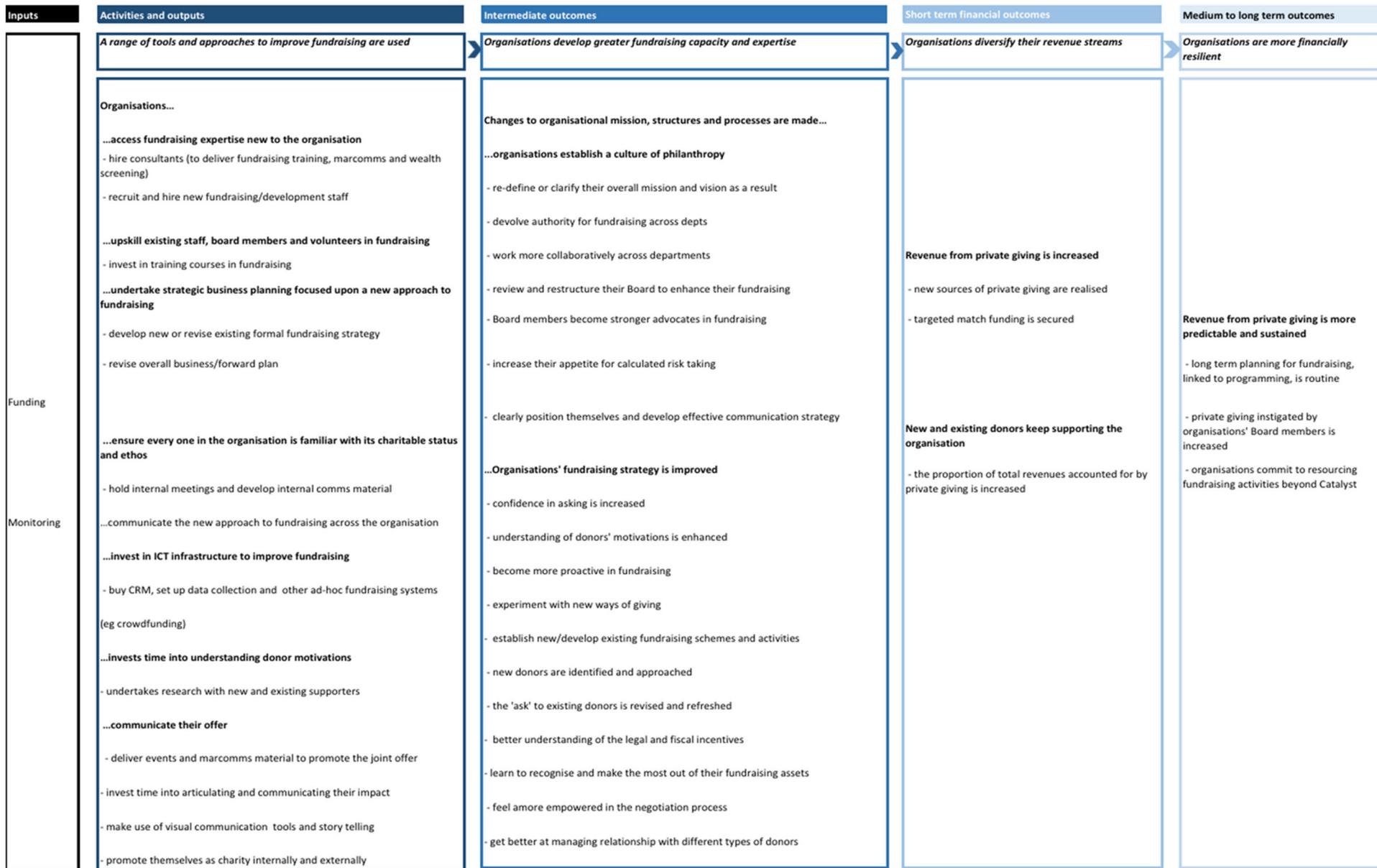
Summary of methods

Our methodology included the research tasks below. An overview of our methodology and research questions can be found in Appendix 9.1.

- Literature review
- Theory of Change design
- Baseline survey at programme start
- Baseline report
- Learning events in Birmingham, Leeds, Bristol and London
- Ongoing dissemination of findings
- Case studies with Catalyst: Evolve
- Counterfactual case studies with Catalyst: Evolve
- Year 3 survey at programme end
- Analysis of private income raised
- Final report
- Dissemination of findings post – programme

Clarification of key terms

- Private giving includes all income that private sources contribute to the voluntary sector. Within the context of this research, private giving includes both philanthropic and sponsorship funding contributed by individuals, trusts and foundations, and corporates.
- Earned income includes income generated by cultural organisations through their own commercial activities including ticket sales and trading.
- Public funding includes all grants from public institutions, including the Arts Council, DCMS, other governmental departments, local authority and public subsidies and lottery funding.



2. The Catalyst: Evolve journey: activities, organisational change and financial change

2.1 Fundraising activities

Within the first Catalyst Arts evaluation, we learned that grantees were likely to engage in a standard set of fundraising activities. These are summarised in the logic model on the previous page. These activities are the building blocks of the 'pathway to change' described in the logic model.

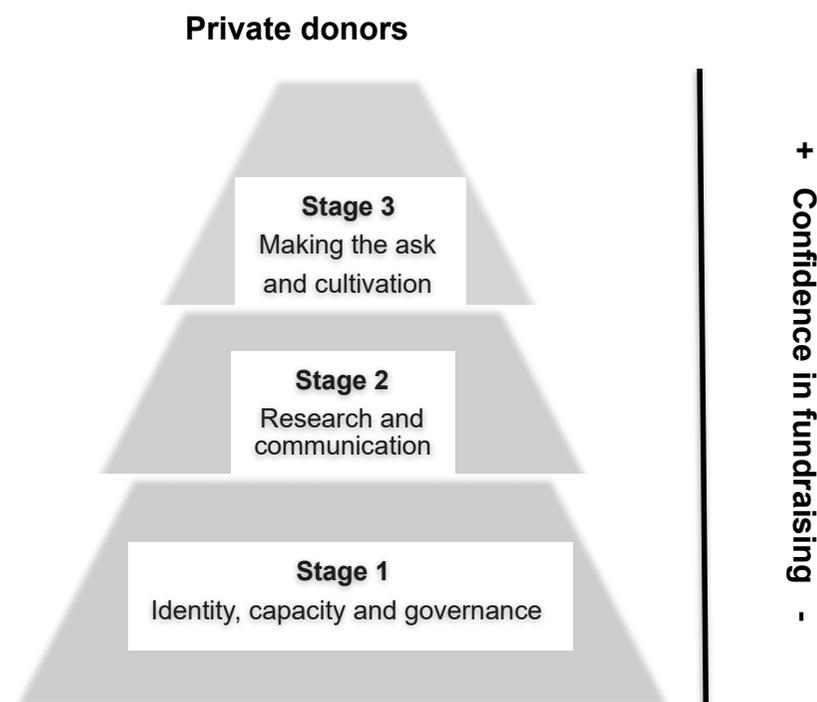
The experience of the Catalyst: Evolve cohort showed additionally that these fundraising activities could be grouped into three stages, as illustrated in Figure 1. The progressive uptake of these three stages tended to be a good indicator of the fundraising readiness of Catalyst: Evolve grantees. The three stages are:

- **Identity, capacity and governance:** internal activities with an internal focus, such as: planning fundraising strategies; training sessions, promoting fundraising internally; working on the organisation's mission and vision; investing in ICT tools to support fundraising; and so on.
- **Research and communication:** internal activities that have an *external* focus, such as: promoting the organisation as a charity to the external world (including its audiences); strengthening the brand and positioning strategy of the organisation; weaving fundraising messages into communication materials and communication channels (including the website and other points of sales); carrying out prospect research; and so on.
- **Making the ask and cultivation:** externally-focused activities that involve direct interaction with private donors, such as: organising fundraising events and campaigns; making the ask and negotiating; designing and carrying out cultivation strategies; and so on.

While the boundaries between stages are inevitably blurred and the reality is more nuanced than the pyramid structure presented in Figure 1, the model is

useful to understand grantees' journey. Our research and sector expertise also highlights that once a grantee has put all the stages into practice, they then continue to work on all three stages on an ongoing basis. In other words: even when an organisation reaches Stage 3, they also continue to work on their Stage 1 and 2 activities.

Figure 1 The three-staged fundraising journey of Catalyst: Evolve grantees

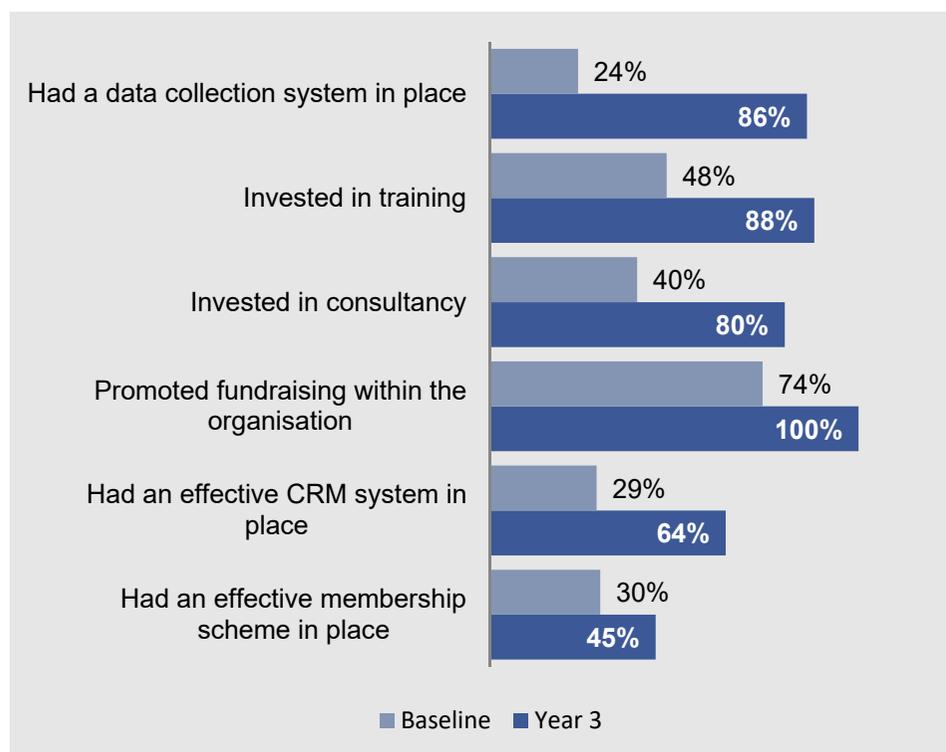


Source: BOP Consulting (2018)

Stage 1: Identity, capacity and governance

Of the 139 grantees in the programme, 93 completed the Year 3 survey. Data collected between Year 1 and 3 clearly shows the programme supported grantees to engage in a real process of organisational change. The gradual and consistent uptake of Stage 1 activities was central in accomplishing this change, as shown by Figure 2.

Figure 2 Stage 1 fundraising activities at start of programme compared to end of programme



Source: BOP Consulting (2020)

The resources allocated to grantees through the Catalyst: Evolve programme enabled them to improve their fundraising infrastructure and address gaps in their skills and knowledge. Most significantly, the data comparison between programme start and programme end (Figure 2) shows:

- 86% had a data collection system in place by the end of the programme and this was up 62 percentage points from programme start
- 88% (up 40 percentage points) invested in fundraising training. Of these, one in three (33%) benefitted from Arts Fundraising & Philanthropy Programme training. Other popular training providers included the Institute of Fundraising (23%), the Management Centre (11%) and the Directory of Social Change (10%)
- 80% had worked with an external consultant on fundraising by the end of the programme (up 40 percentage points from programme start). Of these, 68% were either 'satisfied' or 'very satisfied' with the services they received. Just 5% were 'very dissatisfied'. The quote below highlights how grantees were able to learn from their consultants. This is likely to leave a longer lasting legacy within the organisation

“ We worked with a consultant on a monthly and then six-weekly basis throughout the three-year project period, seeking to make a cultural change in the organisation. We learnt a lot through the process and I think expertise and skills developed has been retained in the team.

- 100% of grantees were promoting fundraising within the organisation by the end of the programme (up 26 percentage points from programme start)
- 45% had an effective membership scheme in place by the end of the programme (up 15 percentage points)
- 64% had an effective CRM system in place at programme end (up 15 percentage points).

“ The funding enabled investment in a new box office/CRM system. We are now able to target specific donation values based on ticket order value. We can also articulate better our charity status and mission with donation buttons across our website.

Grantees had also begun to redistribute fundraising capacity and responsibility within the team by programme end. On average, fundraising and development capacity had been distributed from volunteers to other members of the team.

“ Catalyst: Evolve helped us think how the whole team can/should contribute to fundraising, and now everyone has a target; before, the responsibility lay with mainly one person, which was straining and not sustainable.

Across the internal activities undertaken by grantees, the one that proved very challenging was recruitment. Many grantees found it difficult to attract and recruit candidates with appropriate fundraising expertise. The Year 2 learning events suggested these difficulties might be associated with particular areas, but actually, Figure 3 shows that these challenges apply to organisations across all regions. Nevertheless, some organisations did recruit successfully, as shown in the quote below.

“ The challenge was finding someone who understood the creative sector as well as fundraising.

“ We designed a role which incorporated fundraising with communications and general business development. Perhaps we were lucky, but the ideal candidate applied who was doing a similar role for a local authority venue in a neighbouring area. She was keen to use her skills in a community arts setting as it

was a passion for her that she hadn't been able to pursue recently.

Figure 3 The challenges of recruiting fundraisers, reported at Year 2 learning events

| Region | Illustrative quote |
|------------|--|
| London | 'We wanted to recruit a trustee with fundraising experience and advertised this role. We received only two applications for this specific area – of these one was appointed but eventually had to turn down the opportunity due to other work commitments.' |
| South West | 'Very hard to recruit a member of staff with the skills...' |
| Midlands | 'We tried to recruit a new fundraising role into the team but found it very it very difficult. We had very little interest and there didn't seem to be the skills in our geographical area. Eventually we had to compromise and bring in a freelancer on a part time basis.' |
| North | 'Found it very difficult to recruit in this area. Tried to recruit an external candidate, but found that the calibre of candidates were insufficiently skilled. Eventually decided to recruit internally as a development move. The recruitment of the trustee came from an external recruitment, after many trials through networks etc.' |
| South East | 'Very poor response to advert (only one applicant with relevant skills).' |

Source: BOP Consulting (2020)

Stage 2: Research and communication

Our research also highlights how grantees ultimately developed a better understanding of the funding landscape and improved their ability to reach out and communicate fundraising messages to prospects of all kinds. On the whole, the uptake of research and communication activities really took place between

Year 2 and 3 of the programme, by the end of which all grantees had worked on marketing activities. Year 3 survey data shows:

- 100% of respondents were promoting the organisation as a charity to external audiences at programme end (up 44 percentage points)
- 74% had improved their marketing strategy to support fundraising. Of these, 58% had revised their existing marketing strategy and 42% created an entirely new strategy.

Qualitative evidence gathered through the survey, exemplified by the quotes below, further shows how Catalyst: Evolve really enabled grantees to think of the way they promote themselves as a charity and how they market themselves to the external world. The positive uptake of these kind of activities also shows how, in addition to developing fundraising-specific competences and skills, Catalyst: Evolve enacted a larger organisational transformation, supporting grantees to develop broader organisational resilience.

“ We are in the process of rebranding and re-developing our website, so becoming more data-driven remains a strong priority for 2020 and beyond.

“ We feel better able to communicate that we are a charity that needs support: This has been the main conduit to change. Through Catalyst we learned to have confidence in explaining that the organisation is a charity, which we had found particularly challenging before. Clarifying our vision and mission also helped us achieve this.

“ Working on our communication has transformed people's perception of us and is supporting our financial sustainability in terms of broadening and increasing income. It has also enabled us to do more to help people in our community and ensured we

balance the various aspects of our work with the needs of all local people.

“ Catalyst has raised the awareness both internally and externally of the importance and need to generate income and keep our audience engaged to keep programming world class exhibitions and outreach programmes.

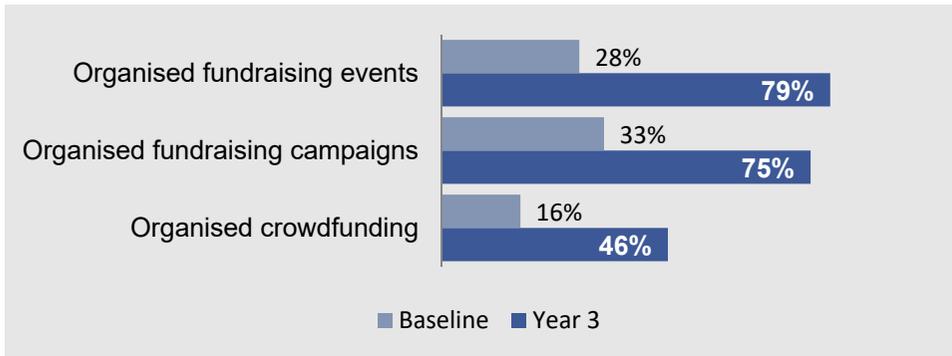
Stage 3: Making the ask and cultivation

Stage 3 of the fundraising journey was the last to be achieved by the cohort as a whole. This is unsurprising given that unlocking private income takes time. The exception to this was a small group of organisations who immediately started to reach out to donors and make the ask.² Most notably, fundraising campaigns and events were organised by almost all the cohort. Year 3 data shows:

- 100% of respondents who already launched campaigns or ran events agreed that Catalyst: Evolve supported their improvement. The type of improvement varied (see Figure 4)
- 79% had organised a fundraising event
- 41% had organised over five events
- 75% had organised a fundraising campaign.

² Reflecting broader trends in fundraising, most of this small and exceptional group already had a more established track record of fundraising and were based in major urban areas.

Figure 4 Stage 3 fundraising activities at start of programme compared to end of programme



Source: BOP Consulting (2020)

The most common lessons were (out of 61 responses):

- Need to be realistic and specific in how and who they are targeting as current and potential donors (13)

“ A very specific goal with a very low target is more likely to have some success in crowdfunding than a vague goal with a high target.

- Making a clear and compelling case for support (12)

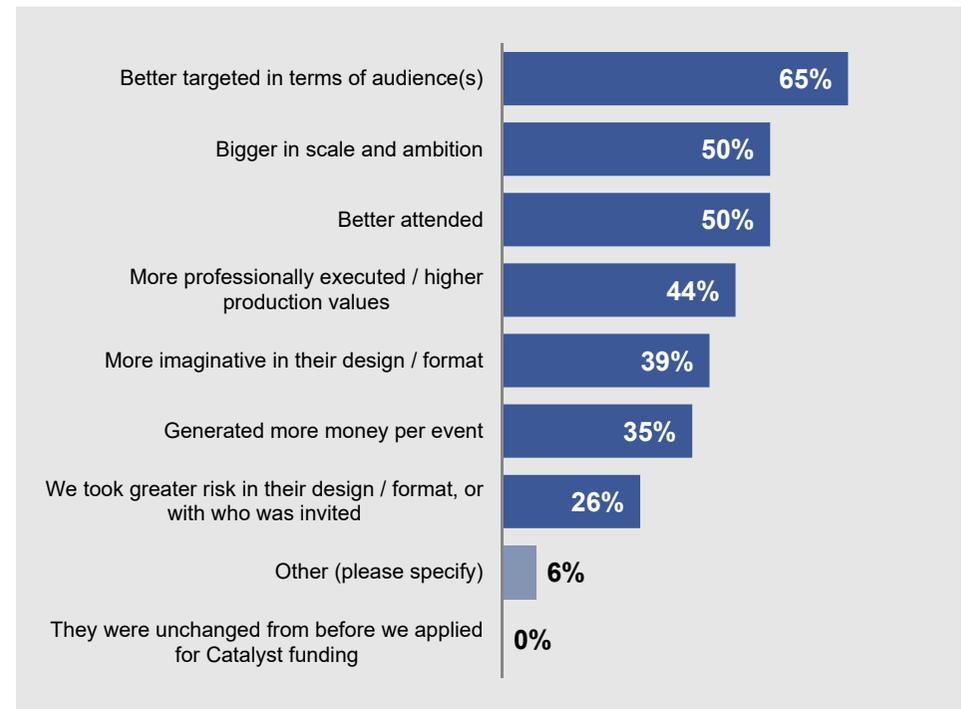
“ Create simple, clear, emotive messages using ‘storytelling’ to make it easier for people to understand why it is important that children have access to music. We would like to do more videos, podcasts, blogs to create those stories and get our audiences engaged with the #MusicCan campaign.

- Having a consistent and targeted approach (9)

“ That not all of our campaigns would be supported by our general customer base (who are families). Campaigns that met their needs or touched their hearts worked best.

- That fundraising is a long-term journey, which needs continued support (8)
- The need for an in-depth understanding of their donors (7).

Figure 5 How fundraising events organised after participating in Catalyst: Evolve compared to prior to the programme



Source: BOP Consulting (2020), n=62

Case study: Planning for success

The Hive is an arts charity and vibrant venue in Shrewsbury. Its programme includes live gigs, film screenings and training. The Hive also facilitates access to creative activities in the local area, running projects and programmes across Shropshire and Telford. Catalyst: Evolve helped The Hive in several ways:

1. Doing the groundwork, planning strategically and getting all hands on deck:

First, upon being awarded a Catalyst grant, the organisation focused on their case for support and on how to best communicate it to donors and prospects. Second, The Hive learned the importance of strategic planning and allowed five to six months of planning and lead-in time ahead of their crowdfunding campaign. These months helped them feel prepared, and all members of the staff team and trustees understood the purpose and aims of the campaign, feeling a sense of involvement and ownership. As a result, they could articulate and share the campaign more widely.

2. Unlocking private income

The Hive ultimately raised over £3,500. Although this was below the target originally set, this felt like a huge achievement, especially as the first crowdfunding campaign ever launched. The Hive is now confident about its ability to run a campaign. Social media was most helpful, and the video stories, case studies and photos that were shared generated momentum and enthusiasm, bringing in some of the biggest donations.

“ Raising over £3,000 felt like a huge achievement for our first crowdfunding campaign and has bolstered our confidence to feel like we can do it again when the time is right.

practices due to the establishment of the new General Data Protection Regulation (GDPR). So how did Catalyst: Evolve help grantees to become more digitally savvy, and how did the new regulations impact their uses of data?

Data collected after the end of the programme shows that most grantees (86%) are now able to collect data about audiences and supporters. We also learned that:

a) Data was deemed invaluable in profiling and targeting donors and audiences and in developing more informed strategies:

“ Data helps segment audiences and tailor fundraising campaigns to improve outcomes. It would be difficult to achieve the same outcomes without robust data collection.

“ We have only just got access to this information by starting to run our own box office, so no details of its value yet.

b) Supporting fundraising through data collection was something completely new to some of the grantees. This was often the case for organisations where fundraising had previously been mainly opportunistic, with no clear strategy in place prior to participation in the programme.

c) Many grantees invested in a new CRM system thanks to Catalyst: Evolve, but the majority were still learning how to get the most out of it.

Use and understanding of data for fundraising

Our research also considered how grantees used data to support more effective fundraising. Here, it is worth noting that the Catalyst: Evolve programme and BOP's evaluation have run at a time when the sector has had to change its

Case study: learning to use a CRM

GemArts is an award-winning arts organisation based in the North East of England. Recognised as a leader in the South Asian and diversity arts sector, GemArts' programme includes concerts, events, festivals, workshops and commissions with artists across all artforms.

1. Setting up and learning to use a CRM

Before Catalyst: Evolve, GemArts did not yet have record data on audiences, participants and partners, but thanks to their Catalyst award, they set up a new CRM system. The CRM is managed by all members of the team and has already enabled GemArts to devise a new approach to fundraising. Thanks to the reporting and analysis generated by the new system, GemArts can now better manage their campaigns, communicating more effectively with donors. Their database also helps generate customised thank you letters, e-mails and direct mail. This makes an incredible difference to cultivation and relationship management.

2. Unlocking private income

Finally, thanks to their CRM, GemArts has unlocked sponsorship and individual donations, most of which went to support their Masala Festival, a yearly event taking place in July.

- 100% of survey respondents found match funding helpful
- 97% had communicated match funding to new donors
- 65% reported that match funding 'helped a lot'.

This said, experiences and uses of match funding have been mixed. Only half (51%) of grantees that responded to the survey found it 'easy' or 'very easy' to progress towards their match funding target. Despite this picture, only 10% of the Arts Council match funding was not drawn by grantees in the end, though there was some divergence across the grantees (see section 5 for more detail).

Considering *how* match funding was used, we learned that the tool was particularly strategic in strengthening bids, campaigns and corporate packages. Further, for those grantees whose fundraising strategies involved major donors, the match funding provided a great tool to refresh and improve relationship management.

Our research does not seem to suggest that these organisations hit their target too early in the programme, and most grantees did take full advantage of the match funding tool as a precious resource.

“ The Catalyst match funding scheme gave us an amazing opportunity to talk to our audiences and donors about our critical need to fundraise and that we are a charity. The incentive that donations would be doubled was an incredibly powerful tool for getting new donations and maintaining strong dialogues with supporters. We were also able to produce compelling and attractive fundraising and thank you materials, so in general the improved relationship with donors has been the most important change for us.

Uses of match funding

Over the course of the evaluation, we observed that match funding was not always a straightforward tool for Catalyst: Evolve grantees. In contrast to the previous Catalyst Arts programme, we found that in Year 1 of the programme, not all grantees were using match funding to good effect, though this was mainly due to grantees still 'gearing up' to the challenge and focusing on building their fundraising capacity. Yet we also picked up how others had not yet fully understood how to use match funding as an incentive to give.

Nevertheless, data collected between Year 2 and 3 showed that all grantees eventually used match funding and that all of them found it helpful. In particular:

3. Organisational change

Another set of key questions that BOP has sought to answer throughout the evaluation concerns organisational change. How have organisations changed as a result of Catalyst: Evolve? What processes and systems have they put in place? Have they worked to improve their fundraising governance? Have they sought to develop a clear strategy and adequate capacity? Have they developed an internal culture of fundraising across the organisation?

Of course, the experience of the Catalyst: Evolve grantees varies across the cohort. However, findings clearly show the programme supported grantees to embark on a journey of organisational change, from building ownership of their fundraising strategy, to developing positive attitudes towards fundraising.

3.1 Fundraising planning and strategy

The programme required all grantees to design a detailed fundraising plan at application stage. This alone was found to be an enabler of positive change. Organisations adopted a structured approach from the onset and by the end of the programme, most grantees had a clear strategy with identified priorities and targets.

The data that we collected at the baseline stage of the evaluation showed that at the start of the programme:

- 20% of grantees that responded to the survey stated that they actually did not have a fundraising strategy in place
- 43% had only a basic fundraising strategy that was not well articulated
- 21% said their strategy also lacked clear priorities and targets.

In contrast, the data collected via the Year 3 survey shows that:

- 95% of grantees that responded to the survey had a fundraising strategy with clear priorities and targets, including, but not limited to, financial targets – a 28-point increase from project start

- 76% reported that they now share their fundraising strategy with the whole organisation
- 59% stated that the entire organisation is now actively involved and engaged in delivering the fundraising strategy
- 73% revised their business plan in light of their fundraising strategy; and
- 44% had improved their mission and vision statement.

“ Our fundraising strategy 2016-19 was a working document with targets and actions that were implemented during the Catalyst programme. Additional bodies of research and work fed into the delivery of this strategy, including our individual giving consultation and report and corporate sponsorship report and recommendations. We are currently in the process of reviewing our strategy in recognition of our fundraising performance and lessons learnt during the Catalyst programme. This will also inform our wider business plan for 2020-22.

“ Catalyst was instrumental to us forming a strategy for fundraising, trying a lot of things out and discovering what didn't, and did, work. We have a much clearer, more realistic strategy for fundraising now than when we started.

We also asked participants to tell us who was actively involved in delivering the fundraising strategy and how actively engaged they were. The senior management team (SMT) was clearly the most involved, with 82% of grantees that responded to the survey stating that the SMT was 'engaged' or 'very engaged' in these activities. This was then followed by the artistic director (70%), board of trustees (69%) and the entire organisation (59%), in terms of those who were 'engaged' or 'very engaged'.

3.2 Confidence in fundraising

The 'groundwork' laid by grantees through their fundraising strategy, revising their mission and vision and their business plans, eventually led to a broader set of organisational changes. By the end of the programme, most grantees that responded to the survey reported the following:

— Feeling more knowledgeable:

- 80% reported their understanding of donor motivations is enhanced
- 79% were more aware of the importance of fundraising

“ There is much more knowledge and awareness about sources of funds and motivations of givers in the organisation from board to executive regarding donors and trusts. This is transformative!

— More confident and empowered:

- 91% reported greater confidence in fundraising
- 88% could better communicate they are a charity that needs support
- 86% had become more proactive in their approach to fundraising
- 68% reported that their relationship management of donors has improved
- 54% felt more empowered when negotiating with donors

“ Through Catalyst we learned to have confidence in explaining the organisation as a charity, which we'd found particularly challenging before...The confidence built from this point and it was a liberating process for everyone in the organisation. We explored the organisation, its vision and mission, purpose, aims and objectives together and realised our own worth; from there we had more confidence in articulating our purpose and raising funds for the work we do as a charity.

“ We now have the strategy and approach in place to be confident that we will begin to see significant increases in financial support over the next 12 months.

— More willing to innovate with their fundraising:

- 79% were now more inclined to experiment with new strategies

— A minority even reported that their overall attitude to risk taking had changed:

- 36% felt more inclined to take on risks in general.

“ We are more ambitious and confident both in fundraising and more broadly.

“ The organisation's confidence in fundraising has increased – working with a consortium there was a lot of shared learning and reflection. Achieving our total target in the first year built a huge amount of confidence across the consortium and enabled us to re-invest in our fundraising strategy.

“ Catalyst definitely made us more proactive – as well as with our original Catalyst programme (consortium) we've managed to maintain momentum with fundraising for many years. This has made a huge difference to our success, especially with trusts/foundations.

Figure 6 Confidence in fundraising: responses to ‘As a result of our Catalyst-supported activities...’



Source: BOP Consulting (2020); n=85-86

3.3 Fundraising capacity

Fundraising capacity has grown at all levels across the grantees. Organisations hired new staff members and shared responsibility for fundraising internally. Data collected at the end of the programme shows that:

- 100% of grantees that responded to the survey had recruited, or tried to recruit, at least one staff or board member in order to increase their fundraising capacity. Of these:
 - 42% hired a new manager with fundraising skills
 - 33% hire a new board member
 - 29% hired a new assistant
 - 10% hired a new director.

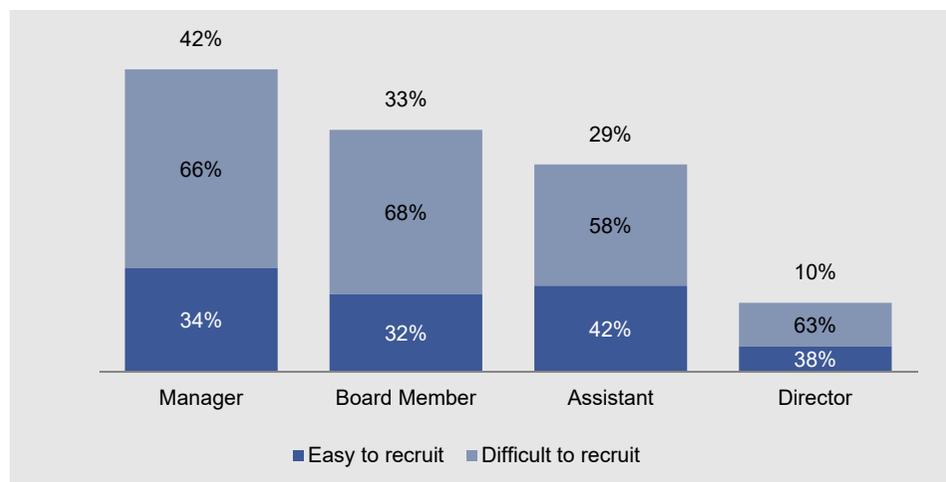
Often, fundraising and development capacity were distributed from volunteers to other members of the team. The biggest increase was with officers, with an 80% increase in the average full-time equivalent (FTE) employees in this role contributing towards fundraising, from 0.34 FTEs to 0.61 FTEs.

Year 2 and 3 data also show that grantees found it challenging to attract and recruit members of staff with fundraising expertise (Figure 7). Of the 42% and 33% of grantees that responded to the survey that they had tried to recruit board members with fundraising skills or fundraising managers, at least two thirds had found it a challenge. Some grantees also reported that recruiting a fundraising director was a challenge, but only a small minority (10%) had attempted to do so during the programme.

As a result, organisations started to share responsibilities for fundraising across all staff members, rather than responsibility lying with one single fundraiser. This helped to establish a culture of fundraising within the

organisation, and this is a very important outcome – one that is flagged as a critical factor of success by general theory and research in fundraising.³

Figure 7 Challenges in recruitment: ‘Did you recruit new members of staff with fundraising skills and how easy or difficult was this?’



Source: BOP Consulting (2020); n=84. The number at the top of each column represents the percentage of organisations that recruited for that position. The column is then split between those who said that finding staff members with appropriate skills was easy and those who said it was difficult.

Case study: Changing attitudes towards fundraising

Catalyst: Evolve enabled The Marlowe to increase their capacity for fundraising, leading to a change in attitude towards fundraising across all levels of the organisation.

Canterbury-based The Marlowe is a relatively large organisation awarded with £150,000 Catalyst: Evolve funding. Of this, £45,000 was allocated for capacity building, and the rest has been secured thanks to the match funding element.

Catalyst partly funded the post for a development manager who, thanks to her previous experience in fundraising, saw the opportunity to change organisational attitude toward fundraising. Thanks to a series of activities, the entire organisation is now more aware of and engaged with fundraising, and moved from a ‘siloed’ approach to a ‘shared responsibility’ approach.

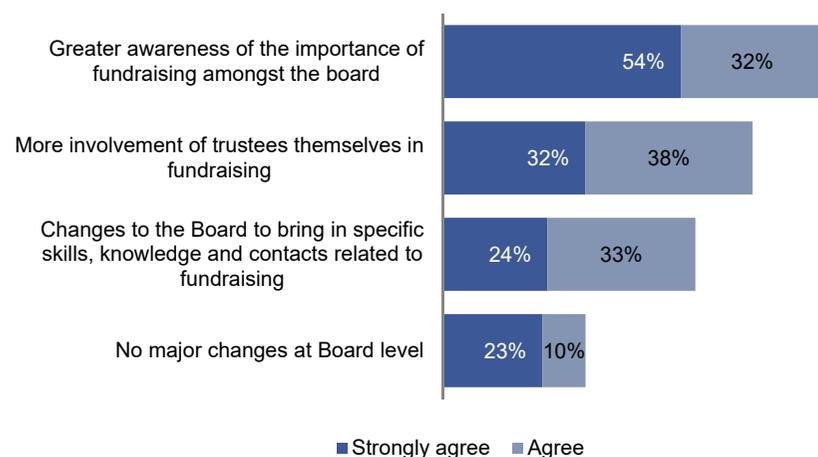
“ I think actually the big change in which Catalyst really helped, was the change within the organisation. Here fundraising was very ‘siloed’ – it wasn't really joined up. And I think that was one of the really good things about the grant: it actually broadened the interest in fundraising, and we managed to do bigger projects that managed to bring funds. We worked with a consultant to understand how to integrate fundraising across the whole theatre.

³ Cynthia M. Gibson (2015) *Beyond fundraising: what does it mean to build a culture of philanthropy?* Evelyn & Walter Haas Jr Fund. https://www.haasjr.org/sites/default/files/resources/Haas_CultureofPhilanthropy_F1_0.pdf

3.4 Engaging the board of trustees

Catalyst: Evolve also helped many grantees to facilitate fundraising discussions at board level in order to engage trustees in unlocking private income. These discussions often led to very positive results (Figure 8).

Figure 8 Common changes as a result of board involvement



Source: BOP Consulting (2020); n=93

In many instances, the programme also helped grantees to empower their boards and help them feel more confident about fundraising. Data collected at the end of the programme showed that:

- 83% of grantees that responded to the Year 3 survey also stated that the board of trustees were now confident in fundraising, which was up 41 percentage points from the baseline survey
- 48% reported that the board of trustees was engaged in delivering the fundraising strategy; and

- 22% stated that the board of trustees was highly engaged.

“ The board being aware of [the organisation] becoming more sustainable was the most important change – as this then permeates through the whole organisation and our activities.

“ The organisation's confidence in fundraising has increased. With a committed and skilled fundraising team, with support from the board, staff and volunteers the organisation is now in a position to build on the success of the last three years, working to both maintain and continue to grow philanthropic income across all strands including individual giving, trusts and foundations and corporates.

Nevertheless, we also learned that most grantees sometimes found it hard to engage their board in fundraising. Our research highlights a common set of challenges that remain for the grantees (see Figure 9), headed by a reluctance to ask for money.

Figure 9 Common board challenges that remain for grantees in Year 3



Source: BOP Consulting (2020); n=86

3.5 Most significant changes

When asking to name the single most important change that happened as a result of the programme, grantees that responded to the survey referred to a series of elements:

- Their improved fundraising strategy, which was often strengthened through clearer and more realistic targets
- Increased fundraising capacity, which in turn supported a broader and more diverse number of fundraising activities, including training and professional development
- Shared responsibility for fundraising across the organisation, including engaging a broad number of staff members and the board of trustees
- Articulating the charitable purpose of the organisation and communicating it with confidence – in other words: finding the right message and saying it well

- Increased awareness of fundraising processes and a greater confidence in different fundraising approaches.

“ We have challenged ourselves to embed a culture of fundraising across the team (including trustees). This has allowed for a greater understanding of how each role within the organisation plays a part in seeking greater levels of financial support...[Catalyst gave] the time and resource to take risks without fear of repercussion. This has carried on since the programme stopped. All staff are now much more confident in the charity’s role/place within the sector and therefore not afraid to make the ask. We believe the ethos of taking more risks has begun to filter through to impact on how we look/view our work, mission and future goals.

Case study: Positioning the art organisation as a charity

Impressions Gallery of Photography is a visual art gallery based in Bradford. It employs just less than nine FTE staff members and was awarded a £113,810 Catalyst grant. Of this, £34,120 was to spend in capacity building while the rest has been successfully drawn down as match funding.

Impressions Gallery’s fundraising campaign, *Be Part of the Picture*, was launched in August 2017 and ran for the duration of Catalyst: Evolve. During the process, the organisation managed to better position themselves and implement an audience-led approach to fundraising. So how did they do this?

First, Impression Gallery organises away days with the board and staff team to work on their external messages. Second, they run a consultation with audiences. Here, they tested their new messaging and learned how to best make the ask. As a result, the organisation is now all geared up to

communicate that it is a charity in need of support and the team is now much more confident making the ask.

“ Being able to articulate this to our audiences and supporters has been fundamental to increasing our income from private income.

3.6 The cost-benefit of fundraising activities

Fundraising requires a considerable amount of time and resources and sometimes organisations can find themselves spending more than they raise on fundraising. One of the questions we therefore explored throughout our research is: has Catalyst: Evolve changed the cost effectiveness of fundraising for grantees, either positively or negatively? Data collected at the end of the programme shows that, for grantees who responded to the Year 3 survey:

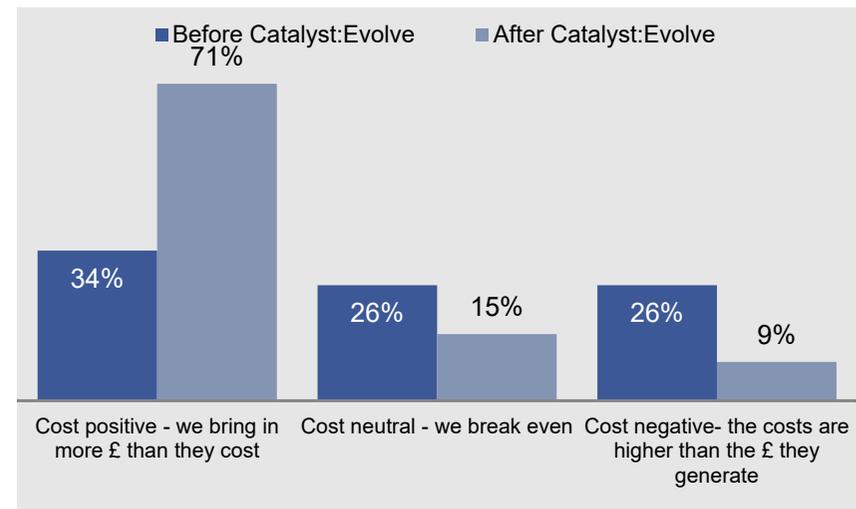
- fundraising activities were cost-positive for the majority of grantees (71%, Figure 10)
- this is a 37 percentage point increase from the start of the programme, when only 34% reported that their fundraising activities were cost-positive.

Further, when looked at as an overall trend, by the end of the programme a net balance of 62% of grantees who responded to the survey reported that their fundraising activities were cost-positive compared with only 8% before the programme.⁴

These results reinforce the findings from the previous Tier 2 and Tier 3 Catalyst Arts grantees, who reported a 31-point increase (at the end of the Catalyst Arts programme, activities were cost-positive for 76% of grantees). In both phases of the Catalyst programme, greater cost effectiveness has been achieved, despite adding more to the cost side of the equation in terms of more staff resources and spending on other items such as campaigns, events and

CRM systems. Clearly, this indicates that while more money is spent on fundraising, it is more than matched by the increase in fundraising income that is achieved through implementing these changes, which is what we focus on in the next chapter.

Figure 10 Cost-benefit of Catalyst: Evolve grantees' fundraising activities, before and after the programme



Source: BOP Consulting (2020)

⁴ A balance is a typical statistical measure used to establish trends within attitudinal data. It is calculated by subtracting the negative responses from the positive responses and ignoring the neutral responses.

4. Financial change

Catalyst: Evolve was designed to help grantees unlock private income. So what financial changes have the grantees experienced as a result of the programme?

In Year 1 and 2 we learned that some grantees were already being successful at raising private income and progressing towards their targets. Nevertheless, others were having difficulties drawing down their match funding. As we know, fundraising is a long-term process and sometimes it is hard to generate results within a limited timeframe. So what do final year results show?

Data collected at the end of the programme investigated how the overall revenue mix had changed for grantees and specifically, whether philanthropy had increased. As shown by Figure 11, there has been a modest increase in the relative weight of philanthropic revenues across the Catalyst grantees. For those that responded to the Year 3 survey:

- Philanthropy as a share of overall revenues increased by +3 points to 16%
- Sponsorship increased by +1 point to 2%

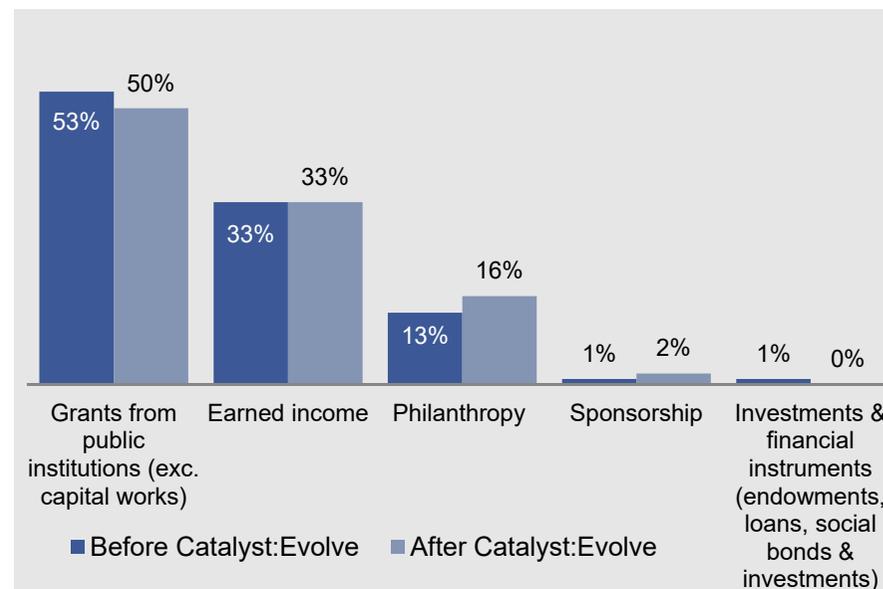
This is a very similar picture to the previous Catalyst Arts programme, in which organisations reported a +4 increase in philanthropy and +2 in sponsorship.

However, the increase in the share of philanthropy is a small change and, combined with the relatively small sample size (in absolute terms), it means that this observed difference is not statistically significant. Nevertheless, as stated before, diversifying revenues is a long-term outcome, one that is likely to take more than the three-year timeframe of the programme. Further, if we triangulate this data with other data in the evaluation, in particular the significant improvement in the cost-benefit of fundraising activities reported by grantees, we can be more confident that there has been some shift in overall revenues towards fundraised sources.

In order to understand fully what this *relative* change in the proportion of different income streams means, we need to know what has happened to overall turnover in the *absolute*. Figure 12 below shows that the average turnover of grantees has grown significantly over the four-year period. After the

close of Catalyst: Evolve, average turnover across the grantees had increased by 27% compared to before the programme had started (moving from £562,800 to £717,300).

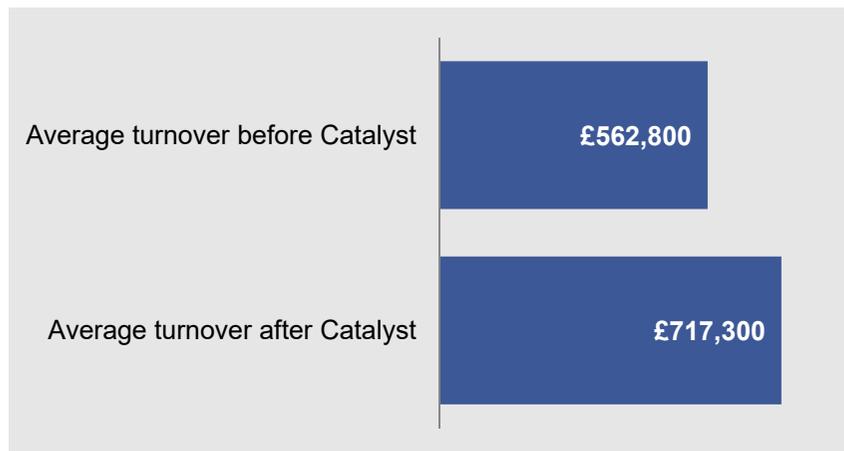
Figure 11 Breakdown of turnover of Catalyst: Evolve grantees by revenue sources (%), before and after the programme, 2014/15 to 2018/19



Source: BOP Consulting (2020)

Given that we know what the absolute value of turnover was before and after Catalyst: Evolve, and we also know how this turnover was generated in relative terms across the different income streams for both of these time points, in theory it is possible to derive estimates for the absolute average amounts that grantees generated by income stream. However, in *practice* this process is complicated by the fact that, as noted above, the percentage changes observed between the before and after mix of revenues are small, and – when also coupled with the small absolute sample size – not statistically significant.

Figure 12 Average turnover of Catalyst: Evolve grantees (£), before and after the programme, 2014/15 to 2018/19



Source: BOP Consulting (2020)

In turn, this means that any estimations that we derive on how the observed changes translate into absolute amounts of money for each income stream pre and post-Catalyst: Evolve, will not be totally robust. For this reason, we are not including them in this analysis in full as they would be misleading. Instead, we can be more sure of the following general statements:

- The fact that average turnover grew strongly over the course of the programme (27%) means that some outcomes are much more likely than others in terms of understanding what has happened in absolute financial terms to grantees' revenue sources.
- For instance, while **grants from public institutions** decreased by only three percentage points over the period, it is still possible that public funding actually rose in absolute terms over the period. This is because even though after the programme had ended grants accounted for a slightly smaller share of the 'cake', the cake as a whole was quite a bit bigger.

- By the same logic, this outcome is even more likely to be the case for earned income as the percentage share remained steady while the overall average turnover grew by more than a quarter, and earned income accounts, on average, for about a third of all revenues for the grantees.
- Philanthropy accounts for a much smaller share of the cake but again, the strong rise in average turnover coupled with a small rise in the proportion of overall turnover accounted for by philanthropy suggests that, on average, grantees generated more money from this private income at the end of the programme than at the beginning.

However, for philanthropy, we can go one step further in verifying this finding, though this is not possible for both grants and earned income. This is because for philanthropy, we are able to draw on a second data source. The survey findings can be triangulated with management data supplied by the grantees to the Arts Council, which is a more reliable source and relates to all 139 grantees and not just the 93 survey respondents (see the following chapter for more detail).

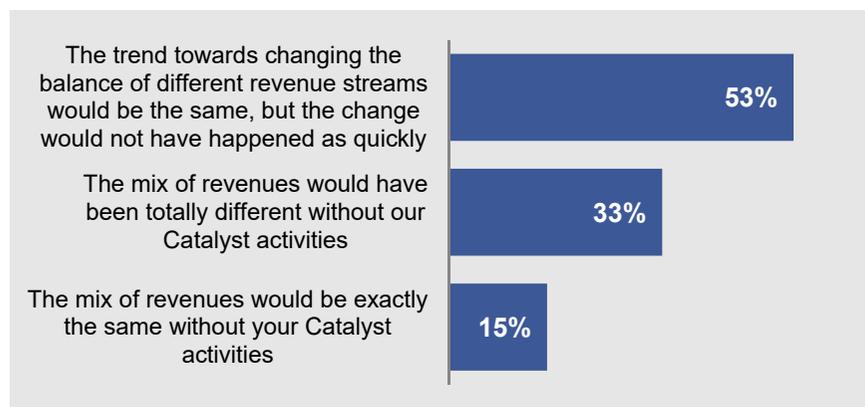
- The management data shows that just under £11.1 million was generated in fundraised income across the cohort at the end of the programme. This translates into an average of approximately £80,000 per grantee after completion of the programme. We can be more confident in this post-programme grantee average obtained from the management data than for the same average that we could obtain from the survey.
- The remaining calculation that needs to be made is to arrive at a benchmark for what this figure was before Catalyst: Evolve. The only source that we can use to derive this benchmark is from the survey data. Using this source, and with the caveats stated above, would suggest that pre-Catalyst total average amount of philanthropic revenue was approximately £70,000 per year. In turn, this suggests that the magnitude of the average increase in private income per grantee over the four-year period is likely to be somewhere either side of £10,000. While this represents only a modest increase, it is a plausible one, given the grantees' profile and capacity, and also one that tallies with the finding regarding the improving cost-benefit of fundraising (see Figure 10 above).

Additionality

We also explored the additionality of the Catalyst: Evolve programme. This looks at how organisations felt Catalyst: Evolve contributed to the reported changes in their mix of revenues:

- Most organisations that responded to the survey (53%) attributed Catalyst: Evolve's impact to lie in accelerating shifts in their revenue mix that were already underway
- One in three organisations attributed a greater impact to the programme on their revenue mix, stating this would be 'totally different' without Catalyst: Evolve
- Only 15% reported that the programme has had no impact on their mix of revenues.

Figure 13 Additionality: the impact of Catalyst: Evolve programme on organisations' revenue mix



Source: BOP Consulting (2020)

Individual giving

Since the start of the programme, the number of organisations targeting individual giving has almost doubled (Figure 14). This seems to have had an

effect on revenues: individual giving has grown as a share of private income by 4 points since project start (Figure 15).

Indeed, many grantees managed to gain financial support from individuals, especially when they organised events and/or took time to explain why they needed support. Individuals who gave to the organisations were mainly low-level donors, i.e. individuals whose donations were typically between £1 and £50. Often, these individuals already had a relationship with the organisation, but were never asked to support it. These findings suggest that the programme was relatively successful in 'unlocking' this donor category. This is an important outcome, because since programme start, individual giving was considered a top priority of the policy. Further, as we report in section 8, the generally difficult external environment that has existed over the course of the programme may have influenced this outcome of Catalyst: Evolve such that it is not as strong as it could have been and/or it might not last as long.

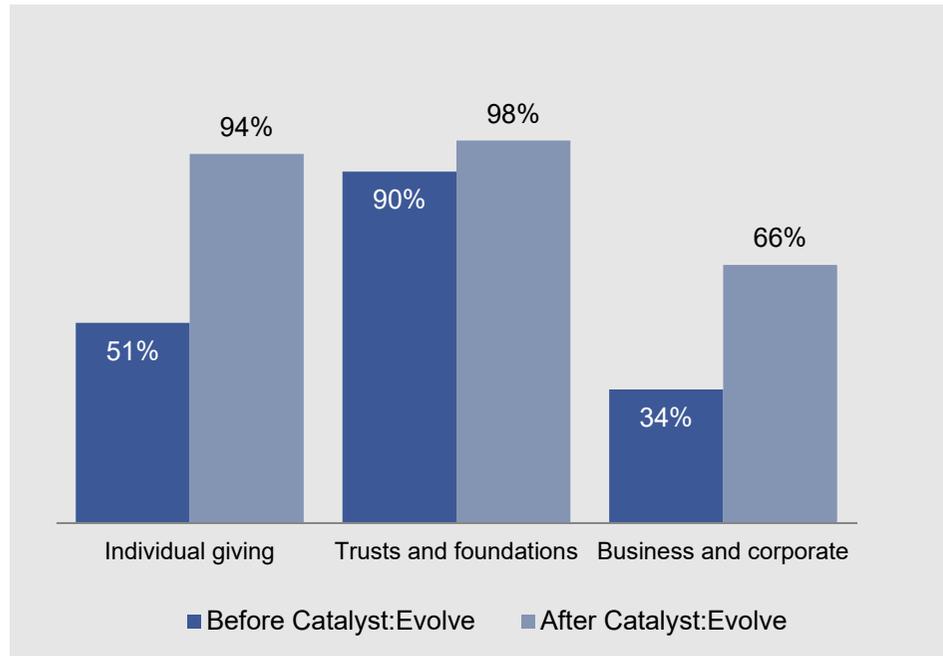
“ The biggest lesson for us is that it [fundraising] works, that there is a potential income stream, especially from individuals. We know that there is. Now it is all about finding the right way to reach that income.

Organisations that secured support from individuals often seem to have a longer track record of fundraising, including prior experience of fundraising from individuals. This was especially so early in the programme, as exemplified by the stories of Poet and the City and East London Dance. Both these organisations substantially exceeded their individual giving targets, but this was achieved through formulating a stronger ask to existing supporters and amplifying their existing donor base.

Corporate support

Corporate income was consistently flagged as the most challenging donor category throughout the three years. In Year 1 and 2 grantees reported that businesses did not show a high willingness to engage in new sponsorship or partnership packages.

Figure 14 Fundraising income targets, breakdown by type, before and after Catalyst: Evolve, 2014/15 to 2018/19



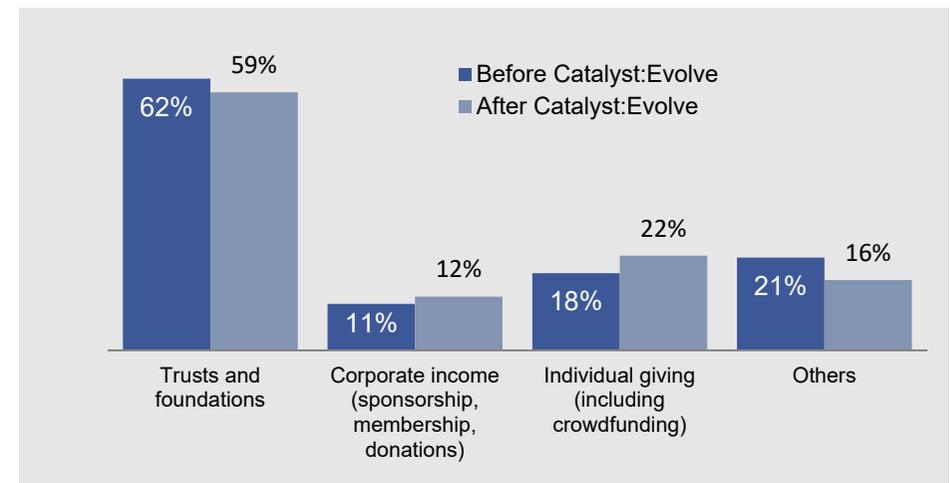
Source: BOP Consulting (2020)

The Year 3 data confirms this, showing that although over 66% targeted corporate funding (Figure 14), the relative increase in revenue from the corporate funding category was only 1 percentage point (Figure 15). Grantees that did manage to raise funds from within this category typically had previous relationships with businesses, as illustrated by the Manchester Jazz quote below:

“ We find corporate sponsorship difficult, as probably everyone is saying to you. What we are trying to do now

is to offer to businesses a one-day residency of artists in local businesses. They are not asked to give financial contributions, but we are doing this hoping that they could become supporters in the future.

Figure 15 Breakdown of philanthropic revenue generated, by type of private income (%), before and after Catalyst: Evolve, 2014/15 to 2018/19



Source: BOP Consulting (2020)

Trusts and foundations

Year 3 data shows that almost all of the grantees that responded to the survey (90%) were regularly targeting private trusts and foundations before the programme started. Despite the pre-existing strong engagement of grantees with trusts and foundations, even more of the grantees were targeting this source of revenue at the end of the programme (98%). Findings from Year 1 and 2 showed that:

- Grantees with a more limited track record of fundraising successfully applied to new (and bigger) trusts and foundations
- More experienced grantees were able to strengthen existing relationships and forge new ones, reporting feeling more confident and empowered as a result of the programme
- A group of grantees reported having reached ‘saturation’ from this revenue stream.

As shown in Figure 15, trusts and foundations still make up the majority of private income across the grantees, but they now account for slightly less than at programme start (-3%). This is a very small decrease but it does suggest that, by its end, the programme had begun to have a small impact on diversifying private giving revenues.

Overall success rates

It should, however, be noted that targeting does not equal unlocking private giving: our analysis shows only a 20% success rate in terms of the new donors who were targeted. This means that out of the 160,000 donors targeted by grantees throughout the programme, 35,000 gave to organisations. This is a relatively low success rate that might be due to a series of reasons including:

- the challenging nature of the macro economic environment (see section 8)
- the increasing demand for, and limited pool of, donors giving to the arts (see section 8 again)
- the organisational profile of grantees which, according to programme guidelines, had to only have had a previously limited track record of fundraising to qualify as a grantee.

This finding regarding the low success rate is also important as it provides supporting evidence as to why the data on the financial outcomes of grantees’ fundraising efforts is modest – whether measured by the likely change in the relative average share of turnover accounted for by philanthropy, or the change in the average amount of absolute philanthropic revenue generated by grantees.

5. Private income raised

This section is based on an analysis of the data returns made to Arts Council England by the Catalyst: Evolve beneficiaries. As these organisations were in receipt of match funding from the Arts Council, they had to provide evidence to the Arts Council that they had raised the private income that qualified within the parameters of the scheme, in order to draw down the Arts Council's match funding.

With the addition of supplementary data on the size and geography of the Catalyst: Evolve grantees, it is also possible to look at distributional questions regarding how the ability to raise voluntary or philanthropy income might be affected by these structural characteristics. We do this first through descriptive statistics that look at whether the amounts of private income raised by grantees varies according to artform, geography and size. As in our previous evaluation of the Catalyst Arts programme, the descriptive statistics are then followed by some econometric analysis that uses a multiple regression to investigate in more detail, and at an individual organisational level, whether artform, geography and size might be genuinely influencing organisations' ability to fundraise.

5.1 Total private income raised

Figure 16 below shows the total amount of grant funding that was available to Catalyst: Evolve grantees, as well as what was ultimately paid out to them. This was a combination of the capacity building element of the programme (which was not dependent on organisations' performance in fundraising), as well as the larger match funding component, which was variable depending on the overall performance of the Catalyst: Evolve cohort to fundraise.

What can be seen in Figure 16 is that the Arts Council made an investment of just over £5 million in building up the fundraising capacity of the 139 grantees (row A1). Of the £12.3 million that was available in match funding, 90% was ultimately drawn down by the grantees (£11.1 million, row B2 in Figure 16). As a result, only a little over £1.2 million that was available to the grantees through

the programme was not drawn down (row C), and 71% of grantees raised 100% of their private income target. Given that Catalyst: Evolve was deliberately designed to target arts organisations with limited previous experience of fundraising, a return of over £11 million in new private philanthropy income across the programme suggests that it has certainly met with some success. As seen above in section 4, the grantees also report that they feel that the programme itself (rather than any other contributory factor that may have happened over the same period) has had a big influence on their ability to generate this income.

Figure 16 Overview of Arts Council England Catalyst: Evolve expenditure and total fundraised income raised by grantees, 2016-19

| | Total (£) |
|---|-------------|
| A. Total Arts Council England (ACE) funds available (capacity building + match funding) | £17,356,279 |
| A1. Capacity building only | £5,038,241 |
| A2. Max. sum of the match funding available | £12,318,038 |
| B. Total ACE funds accessed by organisations | £16,119,171 |
| B1. Capacity building | £5,038,241 |
| B2. Total match funding drawn down | £11,080,903 |
| C. Match funding awarded by ACE but not drawn down by organisations | £1,237,135 |

Source: Arts Council England/BOP Consulting (2020)

5.1.1 Private income raised by artform

The previous section considers the aggregate performance of the Catalyst: Evolve cohort. It is also important to examine whether the generally encouraging picture of private income raised was relatively evenly distributed, or whether it was confined to only some sorts of organisations within the programme.

The first factor to consider is whether artform made any difference to how organisations fared in terms of fundraising. The pattern of all private income raised when broken down by artform is largely proportionate to the distribution of grantees by artform. Combined arts organisations raised more than a quarter of the total income across the cohort (26%) but they also accounted for almost a quarter (24%) of the grantees. At the opposite end, while literature organisations only raised 5% of the total private income raised, they only accounted for 4% of the grantees.

In terms of the average amount fundraised by each artform, dance organisations generated the highest average (£92,621), though as with literature (which had the next highest average of £84,395), these two artforms only covered a small number of organisations each (nine and six grantees respectively). Collectively, it is theatre that ‘underperformed’ the most in terms of artform.

On average, theatre organisations raised the least amount of money of all the artforms – £69,882 compared with an average across the cohort of £79,719, and this was not a result that was affected by there being only a small number of organisations (there were 28). Theatre was also the artform that had the highest percentage of match funding that was not drawn down – 19% – which was significantly higher than the average of 10%. However, there was one organisation within the theatre organisations which is a definite outlier in terms of all the grantees as they only claimed 0.2% of their potential match funding. A second theatre organisation also claimed only 4% of their available match funding. The financial outcomes of these two grantees together has had a significant effect on the statistics for theatre at artform level within the overall Catalyst: Evolve cohort. What these two organisations have in common is that they are touring companies with particular genre/thematic specialisms.

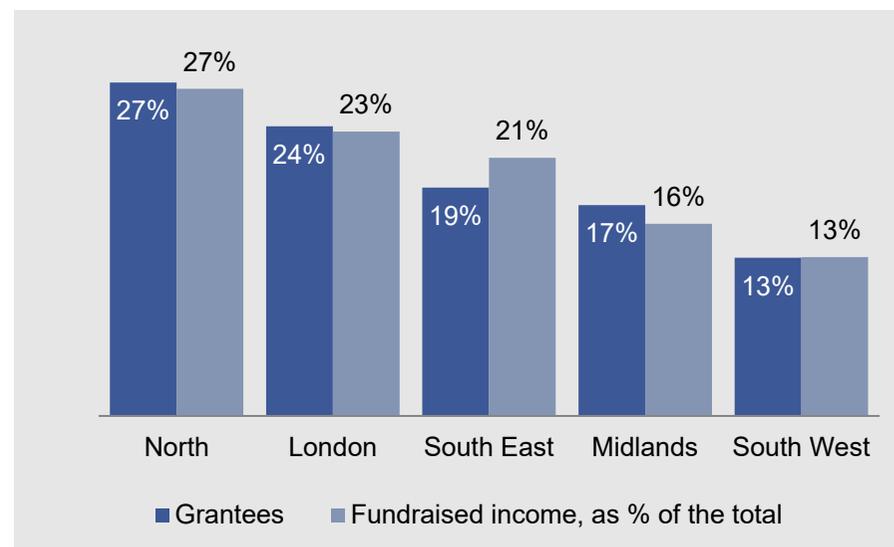
5.1.2 Private income raised by geography

In terms of how the generation of private income raised varied by geography, the pattern shows some similarities to that for artform. As can be seen in Figure 17 below, there is only a 1 or 2 percentage point variance between how much the grantees generated in fundraised income across each of the five Arts

Council areas and the proportion that these regions account for in terms of the overall number of grantees.

Thus, grantees in the North raised the most private income (27% of the total) of all the areas, but these areas also accounted for the same percentage of grantees, the highest proportion across the regions. Grantees in London also did not generate the highest average amount of private income. Rather, the average for grantees in the capital was £78,241, just below the average for all grantees (£79,719) and some way off the highest average across the areas, which was generated by the South East (£90,164). Organisations based in the Midlands raised, on average, the lowest amount of private income (£72,637), some way below the next two areas of the North (£78,184) and London (£78,241).

Figure 17 Percentage distribution of Catalyst: Evolve grantees vs percentage distribution of private income raised, by Arts Council areas, 2017-20



Source: Arts Council England/BOP Consulting (2020)

However, when the amount of match funding that was not drawn down is considered, there is greater regional variance. Across the grantees in both the Midlands and the North, there was more than three times the proportion of unclaimed match funding (19% and 16% respectively) than in the other three areas, which ranged between 3-4% only.

As to what might be causing this divergence, the previously mentioned ‘outlier’ in the dataset in terms of the very low proportion of match funding claimed (0.2%) is located in the North, as are six of the 10 organisations with the largest absolute sums of unclaimed match funding. The Midlands is home to three of the remaining four organisations with the largest absolute sums of unclaimed match funding.

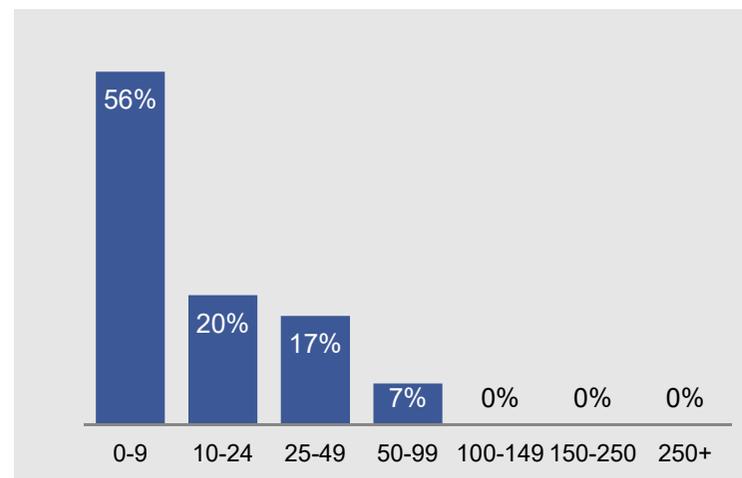
Beyond these observations, it is not clear what is driving the divergence in unclaimed match funding across the regions. That is, it does not appear that other structural factors are influencing the regional results unduly. For instance, it is not the case that the profile of grantees in the Midlands and North contains disproportionate numbers of theatre organisations (which performed worst in terms of the percentage of match funding unclaimed and therefore would have pulled these regional averages down). Importantly, it should be remembered that this indicator is not a direct measure of performance, but of *performance against a target*. It could be that organisations in the Midlands and the North were, on average, simply less able to judge their ability to fundraise in advance – and therefore set more unrealistic targets – than in other areas.

5.1.3 Private income raised by size

The remaining structural factor that has been considered in the analysis of the Arts Council management data is organisational size, as measured by the number of full-time equivalent employees (FTEs). However, the design of the Catalyst: Evolve programme, to specifically target organisations with limited experience of fundraising, has inadvertently meant that the programme has funded predominantly micro and small organisations. Size is therefore less of a differentiating factor than artform or geography – because there is actually little variation across the cohort in terms of size. As Figure 18 below illustrates, 93% of all grantees were either micro (<10 FTEs) or small (10-49) organisations and

there were no grantees in any of the three largest size bands. Indeed, grantees were even more concentrated in the smallest size bands as 76% of all grantees only had between 0-24 FTEs.

Figure 18 Distribution of Catalyst: Evolve grantees, by size (FTEs), 2017-20



Source: Arts Council England / BOP Consulting (2020)

In terms of descriptive statistics, the Catalyst: Evolve cohort is therefore too homogenous in size to be able to report any significant differences in the ability to fundraise related to this characteristic.

5.2 Econometric analysis

The descriptive statistics presented above do not provide much evidence that the ability of the arts organisations in the Catalyst: Evolve cohort to fundraise was dependent on particular structural factors such as size, location and artform. Indeed, the average sums raised by both dance and literature organisations challenge some preconceptions about which artforms are easier or more difficult to fundraise for. While the results for both of these artforms in the Catalyst: Evolve programme are only based on small numbers of grantees

in each case, they also reflect the same findings that were observed in the previous, larger Catalyst Arts programme regarding dance and literature organisations.

Despite the lack of much stronger evidence in the descriptive statistics that size and geography had a significant bearing on the ability of arts organisations in Catalyst: Evolve to fundraise, the econometric analysis that was run in the evaluation of the previous Catalyst Arts programme was still re-run for the more recent second cohort.

To briefly recap, the econometric analysis investigates the relationships between fundraising, size and geography more rigorously. One of the key advantages of econometric analysis is that it can help to disentangle the effect of different explanatory factors. For instance, while it has been observed that arts organisations in London are better at fundraising, many of the largest arts organisations in the country also happen to be based in London – meaning that it is not clear whether any ‘London’ effect may in fact simply be a large size effect, and vice versa. Econometric models can help here by controlling for other variables.

In the econometric model, the dependent variable was the amount of private income raised and two independent variables were run:

- size (as measured by number of FTEs)
- geography (measured as London and the South East versus any other English region)

For the purpose of the regression analysis, the regions were coded into a dummy variable, where 0 stands for London and South East, and 1 stands for the remaining English regions.

The results that were obtained from the econometric analysis of the first Catalyst Arts cohort did provide some evidence that both size (being larger) and location (being in London and the South East) were positively correlated with raising private giving revenues. However, the correlation that was found was only mild, accounting for only around 20% of the observed variation in fundraised income. This meant that other factors – not included in the

econometric model – were driving c.80% of the variation in private income raised across the first Catalyst cohort.

The same econometric model and analysis has been run for the current Catalyst: Evolve cohort. In this second iteration of the programme, there is no real statistical correlation at all (c.6%) between private income raised and the independent variables tested for (geography and scale). Why might this be? There are a number of differences in programme design that are likely to influence the different results:

- As noted above in the previous section, the Catalyst: Evolve cohort is quite homogenous in terms of size – and much more so than the first Catalyst Arts programme that contained many medium-sized arts organisations, as well as micro and small. Therefore, it would be unusual if size had as much influence on the outcomes as there is less variation across the organisations with regard to this independent variable.
- Relatedly, the grantees in Catalyst: Evolve are also more homogenous in terms of the amounts of match funding allocated to them (and hence their targets for fundraising) than in the first Catalyst Arts programme. So again, there is less variation in the amounts of money raised by individual organisations that could be tested for in the dependent variable.
- The number of grantees in Catalyst: Evolve is also significantly smaller, particularly those for which we have information on their size (122 vs 167 in the first Catalyst Arts evaluation), and this makes it harder to establish correlations.

What can these results from Catalyst: Evolve tell us about the wider arts sector?

While it might be tempting to try and extrapolate the results from the Catalyst: Evolve programme regarding the lack of influence of size and geography on fundraising performance, this would be inadvisable. As described above, Catalyst: Evolve was specifically targeted at arts organisations with limited experience of fundraising, which has meant that smaller organisations and

those outside of London are deliberately 'over-represented' relative to the general population of arts organisations.

6. Feedback on the programme

When we evaluated Catalyst Arts we found that most grantees were very positive about the programme. The same can be said about Catalyst: Evolve. As in the previous funding round, it was felt that Catalyst: Evolve provided an opportunity to prioritise fundraising, to test new approaches, and to plan for longer timeframes – and in a more structured way.

“ I really like that it's so open and that you can spend the grant on what makes more sense to you.

“ What Catalyst: Evolve has done is give us some money to play with that we would not have had otherwise (unless taking from reserves). It has given us the time and space to be able to test approaches [...] the application process was quite detailed and enabled us to come up with a fundraising plan, something we haven't done in the past.

In line with programme design and objectives, the match funding element was also found to be very helpful:

“ The match funding has just been an incredibly helpful feature.

The Year 3 findings show that, for grantees that responded to the survey:

- 84% agreed that Catalyst: Evolve increased their ambition to raise funds from private sources
- 65% agreed that the programme helped to lengthen the timeframe according to which they plan their fundraising
- 52% reported that they plan to increase the levels of resources they allocate to fundraising

- 42% plan to maintain the levels of resources they allocate to fundraising post-programme.

Another element of Catalyst: Evolve which was found to be helpful were the learning events, which were organised by BOP in the context of the evaluation.

“ We love the learning event idea.

“ What has been so helpful is that shared learning format [the learning event]. Following the first learning event, we have set up a peer network with other organisations in our area. In addition to growing our network we aim at organising forms of collaborative training. We can bring in consultants and share costs.

Grantees also highlighted elements that could be improved. In particular, they consistently raised issues related to clarity on match funding eligibility and programme timeframes. Some grantees also mentioned that they would appreciate more opportunities to collaborate and learn from their peers, enquiring about the possibility of establishing online networks and knowledge sharing platforms.

“ The pay schedule of the programme is quite restrictive for us, given our frequent cash flow issues, which is quite normal for small businesses. Also, we're finding that more and more funders are paying out in instalments, so not getting those matching chunks as before – which again can cause an issue if you have a tight deadline for claiming the match.

“ It would be very useful to have contacts and speak with similar non-venue non-ticketed organisations and understand how they do data management. It seems that we need a bespoke system, and this could be designed together. It is not important what artform they do.

7. Counterfactual case studies

To fully understand the impact of Catalyst: Evolve, we also need to assess what would have happened if organisations did not get awarded funding. Are organisations outside of Catalyst experiencing a similar development journey? How have they progressed towards fundraising activities and outcomes?

To answer these questions, we turn to the experience of four organisations that are the subject of counterfactual case studies, i.e. organisations that applied for Catalyst: Evolve but were ultimately not selected for the programme. The set of challenges and opportunities they mentioned was similar and included:

- urgency to raise more revenue from private sources in the context of local public funding cuts; and
- the need to secure enough capacity and expertise to raise funds from the private sector.

Two of the organisations had some track record of raising funds from private sources and the other two had almost no experience.

Catalyst: Evolve would have allowed these organisations to: 1) build internal capacity and expertise to support fundraising; 2) hire consultants to expand the organisations' networks and carry out prospect research; 3) apply to a greater number of trusts and foundations; and 4) grow individual giving through organising events, launching campaigns, getting a CRM system, and setting up membership schemes.

“ Beyond having additional funds to employ a fundraiser in-house, full-time, we had longer-term goals that we thought the [Catalyst] funds could support. We know longer term that our funds from our local authority will continue to diminish, and so Catalyst was to help us to bring in a more diverse range of incomes, especially through trusts and foundations, as well as high net worth individuals.

Unfortunately, three of the four counterfactual case studies organisations have only been able to make very little progress against these aims, as they felt they lacked enough capacity and relevant skills.

“ We just couldn't bring our plans forward. We were going to hire a dedicated fundraising member of staff but we could not and as a result we accomplished very little.

“ We've worked with the consultant, but we haven't managed to work as we wanted towards trusts and foundations. We've literally brought her in for a day to overlook our National Portfolio Organisation application, that was unsuccessful. But without the additional capacity that the money would have brought us, we cannot do it.

“ In the aspirations that we put together for Catalyst: Evolve, individual giving was the priority, but we have not had time and resource to address that. What we find difficult is that we have a huge output; the challenge is finding the time to do it. Catalyst would have enabled us to put someone in place to develop that income stream, so we now need to do it alongside other important tasks. We have a lot of ideas (e.g. fundraising events) we would like to host, but the time is what is stopping us.

One organisation is still bringing its Catalyst plan forward, but at a much slower pace.

“ We continued with most of the plans we laid out in our Evolve application, as they came out of a robust research and evidence gathering process into the local and regional market, as well as our own longer-term strategies. The clear difference is just how long it's taking us to achieve these plans.

In summary, the predominant experience of the counterfactual organisations is that, without the capacity building element of the Catalyst funding in particular, these organisations have largely lacked the time and human resources to properly develop and implement their fundraising strategies. This provides further validation as to the additionality of the Catalyst: Evolve programme in bringing about positive change in grantee organisations.

8. External context of the programme

In any evaluation, it is important to build into the theory of change what else – other than the intervention that is being evaluated – might have contributed to observed changes in the target intervention group (in this case the Catalyst: Evolve grantees). This is part of the process of assessing how genuinely ‘additional’ the intervention has been.

A major part of this process is to understand what changes and trends have been underway in the external operating environment that might have had some influence, either positively or negatively, on the outcomes achieved by the grantees. Below, we therefore outline the key macro-economic trends and sector-specific funding trends that have been underway during the course of the Catalyst: Evolve programme (2017-19). We return to what influence they may have had on the programme’s outcomes in the conclusions section below.

8.1 Overall state of the economy

Although the current Covid-19 crisis is clearly front of mind for everyone at the moment, the period during which Catalyst: Evolve has run has actually been dominated by the UK’s protracted departure from the European Union. There are two ways in which the UK’s decision to leave the EU may have some influence on arts and culture organisations:

1. The macro-economic impact that the Referendum and ultimate withdrawal has had, and will continue to have, on the wider economy (and relatedly, public finances)
2. The sector-specific impact that the terms of the UK’s future relationship with Europe may have on issues such as the movement of labour and goods and services.

In terms of the present issue, i.e. the ability of arts organisations to fundraise during the period of the Catalyst: Evolve programme, it is the macro-economic impact that is more important (because the sector-specific outcomes have not yet happened). The macro-economic environment has changed noticeably since the Referendum result, so it is important to consider whether this may have had any influence on the Catalyst: Evolve programme.

In terms of exactly how this may have had an influence, the overall state of the economy is a key factor in how confident businesses and consumers feel about the present and the immediate future (in financial terms), and it also exerts an influence on earnings and wages respectively. In turn, all of these factors affect profits and levels of investment made by companies, and the levels of disposable income and spending of consumers. Business profits and investment, and disposable income are some of the necessary (but not ‘sufficient’) conditions required for fundraising to occur. It should follow that if the economy is performing well, potential donors – both consumers and businesses – will have more resources to give to the arts and other charitable sectors, and vice versa.

As flagged above, while the UK’s actual departure from the EU is recent (January 2020), the macro-economic impact of this change has been felt ever since the Referendum result (June 2016). A combination of Brexit-related factors (the fall in the value of sterling, rising inflation and slowing business investment) on top of an already sluggish picture of economic growth have meant annual GDP growth in the UK stood at just 1.3% in 2018 and 1.4% in 2019. These last two years have seen the weakest GDP growth in the UK since the global financial crisis in 2009. Indeed, one has to go back as far as the recession of 1989-92 to find GDP growth that is worse than that achieved in 2018 and 2019.⁵

The implications of this for Catalyst: Evolve are clear. The duration of the programme coincided with a macro-economic environment that was not conducive to fundraising. Cash has been tight for consumers, and businesses will have been wary to invest due to constrained earnings and uncertainty

⁵ For all GDP stats, see the Government’s Office for National Statistics’ time series data on UK GDP Year on Year Growth at: <https://www.ons.gov.uk/economy/grossdomesticproductgdp/timeseries/ihvp/pn2>

regarding future trading relationships. Therefore, any successes made by Catalyst: Evolve grantees in raising private income have been made in spite of – not because of – the overall state of the economy.

8.2 The broader funding environment for the arts

8.2.1 Public funding

Catalyst: Evolve has been operating during a challenging period for public funding. Dramatic cuts to Whitehall budgets have meant that, outside of the Department of Health and Social Care, spending is set to be 16% lower in real terms in 2020-21 than in 2010-11 (21% below in per-person terms), according to the Institute for Fiscal Studies.⁶

Against this broad backdrop, spending reductions have had an impact on public funding for culture in a number of ways:

- Arts Council England's budget, which was already significantly diminished since 2010,⁷ was cut most recently by £156 million for the funding period 2018-22. In large part, this reflected a fluctuation in receipts from the National Lottery (of which the Arts Councils of Great Britain are recipients). While National Portfolio funding has been maintained in this round, strategy and project funding has been affected.⁸
- Local government has historically been the largest public funder of culture in England. However, in the decade between 2010 and 2020, there has been a decrease in government funding of more than 50% for local authorities.⁹ This has left non-statutory services, such as the arts, at particular risk of being cut.

- By 2017, local authority spending on arts and culture in England had already been cut by £400 million in nominal terms since 2010.¹⁰ Despite several high-profile examples of councils that have slashed their culture budgets, this reduction in culture funding has actually been less than the overall level of cuts that has been imposed on local authorities. This suggests that many local authorities have tried to protect arts and culture budgets as best they can.

The public funding environment for the arts over the duration of Catalyst: Evolve has thus been difficult. But what influence, if any, might this have had on organisations' ability to fundraise?

The answer lies in capacity, security and the ability to plan. Public funding, particularly multi-year funding such as Arts Council's National Portfolio funding, helps to spread the costs of staff posts (or contract staff), as well as providing a degree of security for the immediate future. In addition to giving greater confidence to organisations to be able to make investments in human resources, this also helps with the planning of programmes and other elements of organisational development, such as fundraising campaigns and strategy.

As with the overall state of the economy, the implications for the Catalyst: Evolve programme on the wider public funding environment are thus clear. In general, it has been more of a constraining factor for the grantees rather than an enabling factor.

8.2.2 Private giving to the arts

The previous sections demonstrate that key contextual trends that have affected donors (the overall state of the economy) and arts organisations (public funding) have both been negative over the time that the Catalyst: Evolve programme has run. Given these trends, one might have assumed that private giving to the arts

⁶ Institute for Fiscal Studies (2019) 'Tax and spending since the crisis: is austerity over?', Benefits, Public finances and public spending, Taxes Briefing Note, 17th November. <https://www.ifs.org.uk/election/2019/article/tax-and-spending-since-the-crisis-is-austerity-over>

⁷ For instance, Arts Council England had a 30% budget cut for the period 2010-14 (BBC News, 'Arts Council's budget cut by 30%', at <https://www.bbc.co.uk/news/entertainment-arts-11582070>)

⁸ Arts Professional (2018) 'Lottery shortfall forces ACE to cut 2018-22 budget by £156m', at <https://www.artspromotional.co.uk/news/lottery-shortfall-forces-ace-cut-2018-22-budget-ps156m>

⁹ By 2017-18, government funding for local authorities had fallen by 49%, as reported by the National Audit Office to the Communities and Local Government Select Committee meeting on Local Government and the 2019 Spending Review (<https://publications.parliament.uk/pa/cm201719/cmselect/cmcomloc/2036/203605.htm>) and this spending has continued to decline over the years since 2017 through to 2019/20 (see previous IFS report).

¹⁰ Figures reported by the County Councils Network, based on analysis of ONS Local Authority Revenue and Financing Data: <https://www.gov.uk/government/collections/local-authority-revenue-expenditure-and-financing>

would also have decreased over this time period. However, this is not quite the case.

According to the latest Arts Council's Private Investment in Culture Survey (PIC),¹¹ the cultural sector in England in 2018 raised around £545 million from private philanthropic sources (individuals, trusts and corporates). This was an increase of £65 million from the total reported in the previous 2016 report, though this sum still represents less than 2% of all philanthropic support for UK charities.

- **Individual giving** was both the largest private giving stream to culture (43% of the total) and the fastest growing (11% growth since 2016).
- **Trusts and foundations** accounted for 38% of private giving to culture (£207 million) in 2019, an increase of 4% since 2016. It was well distributed across artforms and represented over 35% of contributed income for each artform. It was relatively more important for literature (56% of all philanthropic income) and dance organisations (49%), as these artforms have struggled to establish individual donor bases and business investments (beyond prizes).
- **Corporate giving** to cultural organisations accounted for 18% of all private contributed income to culture. The £98 million total was a 10% increase since 2016. It is unclear if this rise was skewed by one or more major capital gifts, because the general trend in corporate giving prior to 2019 was significant decline – shrinking by almost a third in nominal terms between 2012 and 2019. A slowing economy, as the UK has experienced over the last decade, means that the era of pure commercial sponsorship is over for all but a few major brands. Many cultural organisations outside this elite few consider *pro bono* partnerships to be the only viable form of possible commercial partnership.

The uneven distribution of private giving income in the UK

While all forms of philanthropic investment in culture are growing, neither the overall income nor the growth is distributed equally.

- 60% of private giving income consistently goes to the 50 biggest 'brands' and these 50 arts and culture organisations are most reliant on individual giving, in terms of philanthropic income.
- The majority of the 50 largest organisations are based in London. London organisations also secured 56% (£55 million) of all corporate giving to the arts and culture in 2018. The prominence of London organisations in terms of both individual and corporate giving income means that region collectively secured a disproportionate 66% of all private philanthropic income in culture in England in 2018.
- Investment in culture from trusts and foundations was more equitably spread than both individual and corporate giving. This was because these funders have made a concerted effort to spread their income nationally and 66% (£360 million) was spent outside London in 2018. This means it remains the most important philanthropic income source for every region outside of London and the South East.

The trends outlined above from the 2018 PIC Survey, concerning the uneven distribution of private income generated through fundraising, are not new as they replicate the findings from the previous iterations of the survey. BOP Consulting's evaluation of the previous Catalyst Arts programme also produced some evidence that reinforces the main findings in the PIC Surveys, albeit with some nuance and counter evidence (e.g. dance and literature organisations in the Catalyst cohort fared better than the national artform picture as reported in the PIC Survey would suggest).

¹¹ This is a survey of arts organisations that has been reporting for every two-year period since 2015. It is commissioned by Arts Council England and undertaken by mtm. The latest 2019 report is available at: <https://www.artscouncil.org.uk/publication/private-investment-culture-survey-2019>

8.3 Summary on external context of the programme

In conclusion, the overall state of the economy, the level of public funding for culture, and long-run trends towards private giving to the arts are some of the most important contextual factors, that could be 'confounding factors', affecting the outcomes for Catalyst: Evolve grantees that are reported on in this evaluation.

Of these three contextual factors, two of them – general economic conditions and levels of public funding – are much more likely to have had a negative impact on the outcomes of organisations' fundraising efforts than a positive one. Thus, these factors can largely be discounted as potential confounding factors in contributing to positive outcomes, which in turn strengthens the likely contribution of the Catalyst: Evolve programme in generating any positive outcomes reported across the cohort.

The trends in private giving to the arts are more equivocal at national level. However, what is most pertinent here is the uneven distribution of private fundraised income. Catalyst: Evolve was directly designed to work with those organisations that, at present, benefit the least from this revenue stream. Therefore, as the continued upwards rise in private giving to the arts in the UK is still predominantly captured by large and London-based organisations, again, this can largely be discounted as being a contributor factor in organisations achieving any positive outcomes that are reported on in this evaluation.

Together, these findings therefore point towards strong additionality for the Catalyst: Evolve programme. This echoes the grantees' responses when directly asked about this in the survey (see Figure 13 above). Grantees have had to fundraise during a period of time that, in general, has not been conducive to this, either for donors or for the organisations themselves.

9. Conclusions

This chapter revisits the key evaluation questions and the programme's theory of change in light of the cumulative findings amassed over the three-year Catalyst: Evolve evaluation, as well as drawing on wider insights from the preceding evaluation of the first Catalyst Arts programme.

9.1 How has the Catalyst: Evolve cohort progressed? A summary

Activities and outputs: A range of tools and approaches to improve fundraising are used

Our research shows a notable uptake in fundraising activities across the Catalyst: Evolve grantees. This includes revising the mission and vision of organisations, promoting the organisation externally and making the ask, as well as supporting organisations' strategies through CRM systems and membership schemes. Most organisations have launched successful fundraising events and campaigns, and these efforts have often resulted in organisations revising their entire communication strategy.

We found that organisations successfully built fundraising capacity and that this enabled them to place fundraising at the forefront of their strategy. Recruitment of fundraising specialists has not always been straightforward. This signals a shortage of skills in the sector, which in turn highlights the importance of different training pathways in addressing these shortages. Encouragingly, many grantees accessed training to good effect through the programme.

Intermediate outcomes: Organisations develop greater fundraising capacity and expertise

As a result of taking up these activities and building capacity, most organisations have achieved an important change within their organisational culture.

Engaging the board of trustees, for organisations of the type targeted by Catalyst: Evolve, remains a challenge. Nevertheless, the programme did help a

considerable share of the cohort to make progress on this front and trigger a step change in their work with their boards. For example, more board members started to give regularly to the organisations, invited contacts from their networks to events, or provided precious help in other ways to support grantees' fundraising strategies.

Grantees have clearly expressed how fundraising now is 'everyone's responsibility', how 'everyone is a fundraiser', and how all staff members now understand how fundraising relates to their role. In fundraising theory (and practice) this has become seen as the number one change that needs to happen if an organisation is ever to succeed in raising funds from the private sector. In this, Catalyst: Evolve has been a real success and met a key goal of its objective to achieve a step change in helping grantees to raise funds from philanthropic sources.

Grantees have also learned to make 'the case' for raising funds in the arts and promoting their organisation as a charity, something that has felt very challenging at times, especially at the outset of the programme. Indeed, our research over the last seven years has provided consistent evidence that the British public does not always understand the arts as charitable organisations that need support, and it was indeed a challenge for grantees themselves to learn how to argue that they are worthy, charitable causes.

To further explore these findings, we interviewed a series of organisations who applied to Catalyst: Evolve but which were not awarded a grant. The experience of these non-beneficiary organisations shows how, in lieu of any dedicated grant funding, it can be very difficult for small arts organisations to put in place the resources necessary to develop and implement fundraising plans.

Short term financial outcomes: Organisations diversify their revenue streams

Of the £12.3 million that was available in match funding, 90% was ultimately drawn down by the grantees, totalling £11.1 million. Similarly, just over 70% of the grantees succeeded in meeting the financial targets they set themselves at programme start in full, drawing down all the match funding grant available to them.

Organisations were also successful in increasing the proportion of raised income that came from individual giving. This was in line with the objectives of Catalyst: Evolve, which has sought to help organisations understand and engage with different types of funders, not just grant-makers. The Catalyst: Evolve grantees who successfully raised funds from individuals, reported feeling surprised at how their longstanding audiences and supporters could eventually be converted to donors.

In contrast to the relative success in individual giving, many more potential corporate sponsors and donors were approached during Catalyst: Evolve than previously, but converting these into actual givers was more challenging, as is the experience in the wider arts sector. Trusts and foundations income has remained quite stable compared to programme start, although the programme did provide an opportunity to 'revamp' relationships and forge new connections with grant-makers, and generally develop better cultivation strategies.

Again, in line with the programme objectives, new donors were targeted, approached and gave to the organisations through the activities of the Catalyst: Evolve grantees. Indeed, in total over 35,000 new donors gave to the grantees over the course of the programme.

The organisational changes that grantees have instigated and the successes in fundraising has also resulted in a dramatic improvement in the perceived cost-benefit of fundraising activities. A net balance of 63% of grantees at the end of Catalyst: Evolve reported that their fundraising activities were 'cost positive', which compares favourably with a net balance of only 8% of the grantees at the outset of the programme.

The financial analysis of the relevant survey questions, when triangulated with the management data supplied by Arts Council England, also strongly suggests that there has been a modest absolute increase in the average amount of philanthropic income generated by organisations, totalling somewhere either side of £10,000. Given that Catalyst: Evolve was deliberately designed to target arts organisations with very limited previous experience of fundraising, the statistics above demonstrate that it has certainly met with some success in contributing towards the diversification of grantees' revenues.

To what extent did the grantee experience vary according to key characteristics?

The major finding in this respect is that the grantee experiences varied less in Catalyst: Evolve than in the first Catalyst Arts programme. The main reason for this is that the Evolve cohort are more homogenous than the first Catalyst cohort. In particular, grantees were overwhelmingly very small arts organisations (76% of all grantees only had between 0-24 full-time equivalent employees, and 93% were either micro or small organisations). This means that the Catalyst: Evolve cohort looks less like the wider arts sector than the first Catalyst Arts cohort did. While the bedrock of the wider arts sector does consist of small organisations, it also features significant numbers of medium-sized organisations and a few large companies, both of which were relatively well represented in Catalyst Arts but much less so in Catalyst: Evolve. This means that it is not possible to easily extrapolate the findings from this study to the wider arts sector regarding the effect of structural characteristics on observed outcomes.

Within the specificities of the Catalyst: Evolve cohort, there was some evidence that grantees that were less successful in achieving their fundraising *targets* for private income were more likely to be located in the Midlands and the North regions. Similarly, grantees in theatre were less likely to have generated all of their target fundraised income than grantees across other artforms.

How has the programme design improved and built on the previous Catalyst programme?

Arts Council England made a number of improvements in the design of the programme that were welcomed by the beneficiaries when compared with the first Catalyst Arts programme:

- Firstly, the match funding element was simplified (the value of which was previously variable over the course of the programme and this made communication with potential donors more complicated).
- Second, wider categories of private income were allowed to be considered for match funding, in particular sponsorship, which was not the case in the Catalyst Arts Tier 2 programme. Several grantees have forged some

important partnerships and the Catalyst: Evolve programme was pivotal in enabling these, even if corporate giving in general has been the hardest category to unlock for grantees.

- Third, the inclusion of a higher number of learning events within the context of this evaluation was also found to be positive. In contrast to the first Catalyst Arts programme, these events ran from the beginning of Catalyst: Evolve, which meant that grantees had the opportunity to meet each other and forge useful networks from the onset.

The one element that did not change from the first Catalyst Arts and which was still found to be challenging in Catalyst: Evolve was the programme's timeframe. Three years may seem a considerable amount of time, but it is still hard to shift to a different financial model within this timeframe. Nevertheless, it should be noted that there are policy constraints that make it difficult for arms-lengths bodies like the Arts Council to launch schemes that are much longer in duration.

Summary

The biggest positive impacts on the grantees has been the uptake of fundraising activity and the subsequent organisational change that has been put in place. Financial change is beginning to happen for Catalyst: Evolve grantees, but this is, unsurprisingly, happening at a slower pace and has taken place against a challenging funding and economic landscape.

Unlocking funds from the private sector and transitioning towards a more mixed economic model requires medium to long-term timeframes and will require organisations to continue to keep up the good work and invest in fundraising. Encouragingly, most grantees are planning to either maintain the resources they now allocate to fundraising or increase the resources they allocate to fundraising in the immediate future.

It remains to be seen whether this impact will be a long lasting. The adversity of external conditions – including the uncertainty posed by an impending Brexit, the economic consequences of the pandemic, the residual effects of austerity, as well as the limited pool of private givers to the arts in England – all pose a risk of diminishing the positive impact of the Arts Council's Catalyst policy.

9.2 Was this impact due to the Catalyst: Evolve programme? Are there other factors that affected impact?

There are a number of sources that we can look to in answering these evaluation questions.

First, evidence from the Year 3 survey (see Figure 13 above) suggests that for the majority of organisations (53%) Catalyst: Evolve's impact has been to speed up changes that would have happened in any case, but just would have happened more slowly and therefore over a longer time period. This suggests that, as with the first Catalyst Arts programme, the intervention overall has indeed operated as a 'catalyst', i.e. something that increases the rate of change. This is important in organisational change as both inertia and a lack of resources are common barriers to change. Catalyst: Evolve has clearly provided resources, ideas, processes and connections that have enabled many grantees to address at least some of these barriers.

However, the changes to organisations and their revenues did not take place in a vacuum. Other factors have also influenced the changes documented throughout our evaluation.

While the longitudinal PIC Surveys show that there is a general trend towards increasing private giving income to culture across England, with the partial exception of corporate support, this general trend hides an uneven landscape of 'winners and losers'. And the kinds of organisations that are not generally among the 'winners' across the sector nationally in terms of their ability to generate private giving income (i.e. small organisations, those that lack a well-known brand, those based outside London and the South East), disproportionately make up the Catalyst: Evolve cohort. This is not by accident but by design.

Catalyst: Evolve was explicitly designed to support those arts organisations that historically have struggled the most with fundraising or have engaged with it the least. Therefore, in targeting inexperienced and small organisations as

grantees, the Arts Council has definitely not supported any ‘low hanging fruit’; quite the opposite.

A reasonable *a priori* hypothesis to have made about the likely success of the programme would be that the Catalyst: Evolve cohort would therefore struggle more than the first Catalyst Arts cohort, and generate less income than the previous set of grantees (and not just because the Arts Council’s funding was lower for this second round, but also because of the type of grantee that has been funded). This has indeed been the case.

Our Year 1 and 2 evaluations documented how the organisations that have participated in Evolve started from a lower base and have had to build fundraising strategies and implement organisational change with generally fewer resources and knowhow. This current Year 3 evaluation shows how hard the organisations have found making the ask, with only a 20% success rate for the new individual donors that were targeted through the programme.

Yet despite having these challenges, the financial data analysed in Year 3 suggests that the grantees have proved to be relatively resilient to-date. Overall average turnover has increased by over 25% and the data strongly suggests that there has been a small shift towards philanthropy in the mix of revenues grantees have generated, and a small average increase in absolute financial terms.

In summary, the negative trends in the wider economy and public spending over the duration of the Catalyst: Evolve programme, combined with entrenched imbalances in private giving in the arts (see chapter 8 above), suggest that without their Catalyst activities, the grantees would have struggled more in this difficult operating environment. Catalyst: Evolve’s success or otherwise should therefore be judged on ‘distance travelled’ by the organisations, as well as by absolute measures of financial success.

9.3 So, ultimately, what have we learned?

Arts Council England has invested in the two-phase Catalyst programme since 2012, when the previous, affiliated programme Catalyst Arts was launched. Our evaluation found that overall, the first Catalyst Arts programme achieved many

of its original objectives. The same applies to the follow-up Catalyst: Evolve programme.

In particular, the programme design of both has featured a combination of capacity building grants and match funding that has been demonstrated to be very helpful to grantees. We consistently found that organisations were able to experiment right from the beginning and that match funding was a great incentive for private donors. In this sense, the two programmes have created an example of how funders can support organisations to help themselves transition towards a more mixed financial model for culture.

We have also learned that organisations of all sizes, and especially the small to medium sized organisations, are looking to collaborate and connect to each other. To support the evaluation process across both phases of the Catalyst programme, BOP has run 12 regional and national learning events. These events have been well attended and grantees continuously expressed how sharing learning and discussing with their peers helped them to better understand and progress towards unlocking private giving.

The third big lesson regards what the ‘pathway of change’ is for organisations looking to improve their fundraising efforts. Our evaluation findings have identified a commonly occurring set of activities undertaken by organisations in pursuing this goal, which then typically lead to recurring processes of organisational change. We have documented these in the logic model. These activities and change processes are essentially the same whether the grantee was a large visual art gallery based in London or a literature organisation based in a rural area. For example, most grantees have accessed training, carried out campaigns, organised events, brought in external expertise via a consultant, and so on. These activities and organisational change processes do not guarantee success, but our evaluation findings over the last seven years strongly suggests that they do increase the *probability* of success.

We have therefore found consistent evidence of how a series of ‘good practices’ underpin successful private fundraising. And so what is the learning from these good practices? We have explored this through 37 *Catalyst Stories*, each one describing a different Catalyst journey across a varied range of organisations. The document can be found [here](#).

10. Appendix: Evaluation questions and methodology

| Theme | Evaluation question | How we will address it |
|------------------|--|--|
| Fund impact | a) What impact has the programme had on grantees in supporting them to achieve a step change in their fundraising practice and diversifying income? | <ul style="list-style-type: none"> • Surveys • Case Studies • Video • Learning Events |
| | b) How and to what extent has the grantee impact varied across: 1. Size of organisation; 2. Geographical area; 3. Art form; 4. Selling or not selling tickets 5. Venue and non-venue based | <ul style="list-style-type: none"> • Analysis of Management Data • Survey |
| | c) How and to what extent has Catalyst Evolve supported organisations to sustain change after the end of the programme? | <ul style="list-style-type: none"> • Case Studies • Survey |
| Causality | 2. To what extent was impact on grantees due to the Catalyst Evolve programme? Are there other factors that have affected impact? | <ul style="list-style-type: none"> • Literature Review • Learning Events • Case Studies • Survey |
| Delivery | 1b) How and to what extent has the grantee experience varied across <ul style="list-style-type: none"> • Size of organisation • Geographical area • Art form • Selling or not selling tickets • Venue and non-venue based | <ul style="list-style-type: none"> • Case Studies • Learning Events • Analysis of Management Data • Survey |
| Context | 3. What have been the key barriers and enablers to the success of the fund, and the progress of its grantees? | <ul style="list-style-type: none"> • Learning Events • Case studies • Survey |
| Programme Design | 4. How and to what extent has the fund built on the lessons from the previous Catalyst fund? | <ul style="list-style-type: none"> • Learning Events • Case Studies • Survey |
| Learning | 5. What lessons can be learnt from the programme to support the future work of i) the arts sector and ii) Arts Council England and other development bodies. | <ul style="list-style-type: none"> • Survey • Case Studies • Podcasts and Video Content • Learning Events • Knowledge dissemination |

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