ARTS SECTOR SERVICE ORGANISATIONS SCAN

Australia Council for the Arts, May 2017

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EXECUTIVE SUMMARY

The Service Organisations Scan was undertaken to develop a greater understanding of the scale and nature of arts organisations whose core purpose is to provide programs and activities that support artists and arts organisations.

SCOPE

The report analyses 111 arts organisations, covering all states and territories and artistic disciplines. Consultation with state and territory arts agencies was undertaken to gain insights into the provision of services in their respective jurisdictions. Limited desktop research on international arts funding agencies and their models of support for service organisations was undertaken and included in the report.

The analysis was limited to considering organisations whose core purpose is to provide services. It did not cover alternative models of service provision, though these models are discussed in the report. The report recognises the many other arts organisations and organisations in other sectors who also serve the Australian arts sector in a range of ways.

SERVICE ORGANISATIONS

The scan determined that the distinction between a service organisation and an artistic organisation has become increasingly blurred over time. Organisations that traditionally acted as producers and presenters of artistic content have extended their remit to support artists through service activities. Conversely, organisations that have traditionally limited themselves to service provision have recognised the opportunities to leverage the talents of their members through directly presenting and even supporting the production of artistic work.

A series of different definitions of a “service organisation” were found within the arts sector both in Australia and overseas. As services provided to the arts sector cover a broad range of activities and target stakeholders, the types of organisations that deliver these services are also broad in nature.

For the purposes of this report, service organisations were defined as organisations whose **core purpose** is to provide programs and activities that support artists and art producers/presenters. Service organisations within this definition range from peak national bodies providing services across Australia to smaller organisations concentrating on a particular regional area.

KEY ACTIVITY AREAS

The scan determined that services provided to the arts sector broadly include functions that promote a particular art form overall (such as publicity and advocacy), through sector-specific programs (such as industry standards and conferences), to support for organisations and individuals involved in a particular creative practice (such as scholarships and awards). Activities were classified into one of 46 activities within 11 activity groups.

Of the analysed organisations, 97% engage in member communication activities including newsletters, social media, and journals. 83% deliver capacity building activities. 43% engage in advocacy, and 36% undertake research and evaluation. The analysis shows that organisations that engage in public communications are more likely to also deliver research and evaluation and advocacy services. The scan did not evaluate the quality or value of these services.

BUSINESS MODELS

The scan also classified organisations into one of four business models based on their activity profile, with the majority (55%) focusing on delivering activities within a core set of four to eight activity groups. Only three organisations delivered services across all 11 activity groups.

THE DIGITAL ERA

The scan identified that the advent of digital methods for communication has opened up information and opportunities to artists that were previously only available through specialist providers. Similar to all industries and across society, digital advancement has greatly enhanced the ability of people to share information and resources informally and across traditional borders.

FORMAL & INFORMAL NETWORKS

It is clear that individual artists and arts organisations seek services from an extremely wide range of sources. Support and services are being provided formally and informally by organisations and networks, through entities that are funded and unfunded, and from sources both within and outside the arts sector. The provision of services to artists and arts organisations represents a complex interplay of stakeholders both within the arts sector and in the wider marketplace.

DIVERSITY & COMPLEXITY

The report provides an insight into the diversity of service organisations, the activities and services they provide to the sector, and the geographical distribution of services. To explore the quality and value of services provided to, and utilised by, the arts community, a far more detailed and extensive survey of artists and arts workers and investigation into the extent and value of informal service delivery provided by other arts and non-arts organisations and individuals would be required. Analysis of the 111 organisations and the consultation with state and territory governments did not identify any particular issue that would warrant a further stage of analysis.

ACKNOWLEDGEMENT The Australia Council would like to acknowledge the arts sector and organisations who have contributed to this initial scan in their work through their organisations and ongoing support of the arts sector. This is a complex area and relies on continued dialogue with the arts community. The Australia Council is committed to leading a continued dialogue on this and other issues that impact the growth and sustainability of the arts community.

INTRODUCTION

The objective of the Service Organisations Scan is to develop a better understanding of the mix, activities and reach of service organisations throughout Australia, and through this to consider the state of service provision to the arts sector.

The specific aims of the scan are to:

- Explore the definition of a service organisation in the arts sector
- Create a methodology for identifying and classifying service organisations and their activities
- Discuss alternative formal and informal mechanisms for service delivery beyond that of service organisations (e.g. arts centres, artist networks)
- Discuss the Australia Council's programs that provide support to service organisations
- Provide an analysis of the ecology of service organisations in the arts sector: who they are, their business models, who their general target audiences are, and what activities they undertake
- Provide an analysis of international models for service organisation support

The scope of this scan does not extend to making recommendations on policy, on funding directions, or funding outcomes. It does not evaluate the quality or value of the services provided by organisations that have been considered in the scan. Business models are investigated to a limited extent in the analysis, however rich detail on target audiences for each organisation was not available. The scope of the scan does not include the investigation of the extent or value of services provided through informal and formal means by other arts and non-arts organisations or through artist networks. Nonetheless this scan acknowledges the important role provided by these organisations in supporting the arts sector in Australia. The section "Service Delivery Mechanisms" provides greater discussion of the services provided by these parts of the sector.

There are also limitations to the scan with respect to mapping the complete ecology of service organisations. Some organisations that fulfil the criteria for service organisations could have been missed in the scan if their funding or business models do not intersect with the national or state arts agencies. Conversely, the extent of services provided by some organisations may be underestimated as the scan methodology did not allow complete exploration of the detail underlying their service descriptions.

This scan illustrates the complexity of looking at service provision across arts practice areas. There is not a "one size fits all" approach to service provision. Rather this scan shows that new organisations and business models are emerging, and that arts practice is not isolated from other areas of the market place.

The challenge for organisations providing services is to develop and execute strategies that reflect the needs of the artists and organisations they serve, while testing and embracing new approaches to service delivery, and maintaining alignment with their core mission.

The authors of the report would like to acknowledge the time, input and insight that has been provided by a range of internal and external stakeholders throughout the development of this report, in particular:

- ArtsPeak
- Arts Queensland
- Department of Culture and the Arts, Western Australia
- Arts NSW
- Creative Victoria
- artsACT
- Arts NT
- Arts South Australia
- Arts Tasmania
- Department of Communications and the Arts, Australian Government
- The Arts Practice Directors of the Australia Council for the Arts

DEFINING THE SERVICE ORGANISATION

There is no single, universal definition for a service organisation. As services provided to the arts sector cover a broad range of activities and target stakeholders, the types of organisations that deliver these services are also broad in nature. In preparing this paper, a series of different definitions were found within the arts sector both in Australia and overseas:

ArtsPeak, the peak body for arts service organisations in Australia refers to organisations with *"…a commonality of purpose… including providing the following:*

- *artform sector consultation and research*
- *advocacy*
- *legislative and regulatory change*
- *industry standards*
- *sector leadership and marketing*
- *training and development*
- *protection and development of artists' income generation capacity enabling them to sustain lifelong careers."*[1]

ArtsNSW defines service organisations as entities that *"…play important roles in the areas of advocacy, capacity building, communications and support."*[2]

The Childers Group, an advocacy organisation in the ACT states:

"Service organisations such as Ausdance are not artists, dance companies or funding bodies, but they do have a clear role in supporting artists and advocating on their behalf."[3]

The Department of Communications and the Arts has its own working definition of service organisations which it applies in its Indigenous Visual Arts Industry Support program, which focuses on organisations which support other arts organisations:

"Industry service organisations offer a range of services tailored to meet the needs of their constituent art centres, or to address broader industry priorities. Services include professional development and training for artists, board members and staff, advocacy, business management and marketing assistance for art centres and support for arts workers. As well as this, the service organisations provide advice to governments, and are a valuable link between governments and the industry."[4]

Internationally, Arts Council England has introduced in 2016 the concept of a sector support organisation, analogous to the service organisation:

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[1] Private Communication
[2] http://www.arts.nsw.gov.au/index.php/arts-in-nsw/peak-and-service-organisations/
[3] http://www.childersgroup.com.au/how-important-is-it-that-there-are-arts-service-organisations/
[4] Department of Communications and the Arts (Australian Government), "Indigenous Art Centre Plan", 2016

"Sector Support Organisations offer support services to our sector, rather than producing arts and culture themselves."[5]

"Sector Support Organisations include Bridge Organisations, Museum Development Providers, umbrella and networking organisations, strategic library and museum partnership bodies, and other organisations that support the arts and cultural sector as ***part or all of their function****."*[6]

What is common to these definitions is that a service organisation is defined in terms of the activities, rather than self-definition as a service provider. This inevitably leads to a very broad scope of what might be a service organisation, and the section "Service Delivery Mechanisms" provides greater detail on the breadth of service provision mechanisms to which artists and arts organisations have access.

For the purposes of this analysis, the Australia Council has employed a narrower definition. Service organisations are organisations whose **core purpose** is to provide programs and activities that support artists and art producers/presenters. These organisations undertake activities that do one or more of the following:

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

[5] http://www.artscouncil.org.uk/four-national-portfolio-categories/sector-support-organisations
[6] Ibid.

IDENTIFYING AND CLASSIFYING ORGANISATIONS

Identifying Organisations

The starting point for identifying appropriate organisations was Australia Council funding application records submitted in 2015 from the current Four Year Funding program and the superseded six-year funding process, both of which capture information about the type of services provided by the submitting organisations. Organisations classified as service organisations had self-identified as such either in their four-year or six-year funding application (through selecting their assessment criterion as “quality of services to the arts”), or in previous interactions with the Australia Council.

This list was evaluated in line with the above definition of service organisations through consultation with Australia Council Arts Practice Directors for each of the art forms, Indigenous Visual Arts Industry Support (IVAIS) program staff of the Department of Communications and the Arts (in relation to Aboriginal and Torres Strait Islander Artist (ATSIA) service organisations), and augmented by information provided by the government arts funding bodies for each of the states and territories. This information was then combined with desktop research to create a finalised list of organisations for analysis, which is provided in Appendix 3.

Information sources for the scan

To identify the services provided by organisations, information about the scope and activities of organisations was gathered through desktop research. The main sources were strategic plans (where available) and material published on organisation websites. The richest source of information available was the detailed application data for the Four Year Funding program held on the Australia Council’s grants management system (GMS) database, and that for the superseded six-year process.

Geographic coverage definitions used in the scan

It is worth noting that while an organisation may be located in a particular city or state, this does not necessarily provide an accurate reflection of the geographic coverage which the organisation’s services reach.

For this work, organisations were classified according to the geographic ‘reach’ of their services as:

– National: organisations that provide services across Australia or whose geographic scope extends across multiple states.

– State/Territory: organisations that provide services across a single state or territory but not outside that state or territory.

– Regional: organisations that provide services over one or more geographical areas within a single state or territory but not across the entire state or territory.

Art form definitions used in the scan

Organisations were allocated to one of nine arts practice areas according to their art sector focus, using the Australia Council assessment panels as a starting point to categorise and define these areas. An additional segment was created to capture organisations that focus on strategic services that are applicable across all art forms, such as legal services and administrative training.

A further segment was created to capture organisations that provide services to stakeholders in more than one arts practice area. This Multi-Artform area includes organisations that serve artists working in multiple arts practice areas as well as organisations that serve artists working in emerging and experimental fields of artistic practice.

Greater detail on the methodology employed for the scan is provided in Appendix 1.

The list of organisations in Appendix 3 contains details of the geographic coverage classification and art form categorisation for each organisation in the dataset.

DEFINING SERVICES

Services provided to the arts sector range from broad promotion of a particular art form to the general public, to specific financial or educational support for individuals involved in a particular creative practice. The scan identified eleven service categories containing 46 separate activities provided by organisations that can be defined as a service to the arts sector.

Service Categories

To allow comparison of service provision across arts practice areas and regions, and to gain an understanding of the overall service organisation landscape, the scan used a framework of service categories. Individual service activities provided by the organisations in the arts sector were classified according to ten main service activity categories based on a framework provided by ArtsPeak:

1. Public Communications
2. Research and Evaluation
3. Advocacy
4. Capacity Building
5. Member Income Generation
6. Member Promotion
7. Industry Standards
8. Sector Leadership
9. Member Communications
10. Management of Devolved Programs
11. Other Activities

Each activity undertaken by a service organisation was allocated to one of these categories to develop a view of the prevalence of activities across arts practice areas and regions. Any service activity that did not ‘fit’ one of these service categories was allocated to the “Other” category (Table 1).

Service Activities

Note that the data collected about each of the 46 activities is limited to whether or not it is undertaken by an organisation, with no assessment of the quality, reach or frequency of the service, or evaluation of its ‘value’ or ‘impact’. Thus each single activity undertaken by an organisation has an equal value in the quantitative analysis whether it is provided by a national peak body or a locally-focussed organisation.

Table 1: Classification of activities by category

Service category (abbreviation)	Specific activities
Public Communications (PC)	– media releases – public forums – other articles
Research and Evaluation (RE)	– sector surveys – policy research – impact studies – evaluation – other research[1]
Advocacy (ADV)	– lobbying – public campaigns – submissions to inquiries – meetings with key decision makers – action groups – other advocacy activities[1]
Capacity Building (CB)	– educational offerings[2] – professional development[2] – toolkits – mentoring programs – peer-to-peer knowledge sharing
Member Income Generation (MIG)	– scholarships/fellowships – jobs banks – grants banks – artist fees[3] – retail[4]
Member Promotion (MP)	– awards – featured artist programs – member advertising/promotion – facilitated exhibitions[5]
Industry Standards (IS)	– developing/monitoring industry codes of practice – accredited training
Sector Leadership (SL)	– sector networks/groups – conferences/workshops – representation on boards – mediation
Member Communications (MC)	– member newsletters/magazines – journals – social media – other communications

Service category (abbreviation)	Specific activities
Management of Devolved Programs (DP)	– initiating/managing programs on behalf of other stakeholders – acting as guarantor/administrator on grants – managing sector-wide schemes
Other (O)	– consulting[6] – touring/presenting service – software/web platform development – equipment/space hire – licensing fee/royalty collection service – other services

Notes:

1. Falls outside other activities or not specified by the organisation.

2. Educational offerings covers programs for the public, corporations and schools (early learning, primary and secondary) whereas professional development covers programs for arts professionals including educators.

3. Artist fees includes income from commissioned works, appearances at sector events and leading capacity-building activities.

4. Retail includes both online and 'bricks and mortar' stores where artists' works are sold.

5. Encompasses any presentation of artists' works (any discipline).

6. Fee payable services from professionals. Excludes informal career and artwork advice captured in other services.

SERVICE DELIVERY MECHANISMS

Beyond the dedicated service organisation which forms the majority of this analysis, this report notes that transformations in society and the marketplace have, created new means by which artists and arts organisations can obtain services.

In the process of developing this report, seven types of mechanisms were identified for service provision to artists. As noted, the scan is limited to the first of these mechanisms, but the prevalence of the other mechanisms within the arts are noted in brief below. There is no hard and fast line that separates such mechanisms, and service providers can alternate or evolve from one to another as their strategic priorities change. Importantly, an artist or arts organisation may obtain services from any or all such mechanisms.

Dedicated Arts Service Organisation

The dedicated service organisation forms the core of the analysis presented in this report. It represents organisations who explicitly or implicitly define their core activities to be the delivery of services to artists or arts organisations.

Even so, the business models of the dedicated service organisation have great variety, in terms of their selection of activities, their geographical scope, their means of revenue generation, and whether they choose to deliver services to members only or more broadly. The section “Analysis: Business Models for Service Organisations” explores this variety in greater detail.

All-in-one Organisations

This group of organisations represents the hybrid model by which services are provided to stakeholders as well as activities relating to presentation and/or production of artistic content. None of these three activities are explicitly prioritised over others, and in many cases, activities are linked together to maximise value and efficiency. The prime example of this model can be seen in the regional and community arts space, where a local arts centre acts as a nexus for local artists, arts organisations, and the broader community to engage with art.

Presenters/Producers with Complementary Services

Further removed from the All-in-one organisation is the model by which an organisation may focus primarily on the production or presentation of artistic content, but may deliver a service to meet a need in their market area, or to maximise the utilisation of its assets. An example may be an arts centre that organises and facilitates the occasional delivery of capacity building programs, leverages its ticketing facilities to support smaller organisations and venues, or hires out equipment.

Galleries, Agencies, and Labels

An emerging mechanism for service provision is through private art galleries, agencies and record labels. Such businesses increasingly perceive themselves as providers of services to a closed membership group, rather than purely as brokers that sell an artist or group to the broader public.

This shift is driven by the emergence of new delivery channels of artistic content, particularly through digital media. This has increased the capacity of artists to deliver direct to the consumer rather than relying on an intermediary. Crowdfunding can supplant the role of the advance payment, and websites for artists are both showcases and showrooms where a buyer can select and buy art without leaving their house.

As such, galleries, agents and labels have begun to alter their value proposition to artists to remain relevant and competitive. There is a shift to focusing on the value maximisation to artist, by demonstrating expertise and experience in the industry, and in providing access to networks that can further benefit the artist.

Informal Networks and Artist Run Initiatives

The informal provision of services to the sector, and service provision through artist run initiatives is another important delivery mechanism. Many services can be provided on an ad hoc basis by other arts and non-arts organisations or through direct knowledge and resource sharing between artists.

Informal networks can arise where there is not the “critical mass” of artists or organisations to require a formalised structure for service provision, or where artists are well connected through social and professional networks. An example is the theatre sector in the Canberra region, which does not have a dedicated service organisation serving solely that region, but is of sufficient size and quality that professional development can take place informally or semi-formally as artists band together to arrange activities. By its nature, the informal network is difficult to measure both in extent and value.

Artist run initiatives are more formal in structure, and initially arose as a means for artists to collectively organise joint exhibitions and performances. Over time, the scope of such initiatives has expanded to include collaborative spaces for art making and equipment sharing, and subsequently to activities that fall within the definition of services, such as capacity building and advocacy. The defining feature of these initiatives is that they are entirely member driven in terms of their administration and strategic direction, which for the most part differentiates them from other models of arts organisations.

Independent Service Provision

Artists and arts organisations may also make use of services provided independently of a formal arts service organisation, but from a specialist in a particular field. The most common example of this is the use of online resources and tutorials through YouTube and other platforms, by which knowledge can be readily shared at virtually no cost to the recipient. The increased prevalence and relevance of online education providers such as Coursera has also opened services such as capacity building programs to a wider audience and at a world-class level of expertise.

Out-of-sector and Alternate Sector Support

The final mechanism of note considers the fact that some services have analogues or close comparisons to those provided in other sectors, especially those with a strong not-for-profit cohort, or the broader “creative industries” sector. Accountancy, legal services (particularly contracts and IP), and consulting are examples of these.

AUSTRALIA COUNCIL SUPPORT FOR SERVICE ORGANISATIONS

The Australia Council for the Arts in pursuit of its strategic objectives provides extensive support to both arts service organisations as well as organisations which provide services alongside other activities. This section describes some of the mechanisms by which this support is provided to the arts sector.

Four Year Funding

The Four Year Funding Program provides multi-year core program funding for small to medium arts organisations of significant regional, national or international standing.

Under the current cycle of funding that was announced in 2016, 18 organisations meeting the definition of service organisation in this report are being provided with over $3.9m of support per year through this program, representing 14% of the total cohort of organisations both in terms of number of organisations and in funding.

Core Grants

Service organisations of all sizes and geographic scopes are eligible for support under the core grants program. This program provides support at a project level, allowing organisations to apply for funding that can assist in the development or consolidation of services.

Strategic Development and Advocacy

Alongside the Australia Council’s funding programs, support to service organisations is also provided through strategic activities that are designed to grow the capacity of the sector, and to develop sustainability. The Australia Council offers a number of capacity building programs such as the Arts Leaders program and Governance workshops. Through programs such as Visiting International Publishers it is able to broker connections between the Australian literature sector and international publishers.

The Australia Council commissions and undertakes research work, publishing studies that look at the arts sector in Australia, as well as how the general public engages with the arts in Australian society.

The Australia Council also undertakes a program of advocacy, working with governments and key decision makers to raise the profile of issues relevant to the sector.

In this sense, the Australia Council undertakes activities that fall within the definition of services to the sector.

ANALYSIS: ORGANISATIONS

This section presents aggregated figures for the cohort of identified service organisations, with breakdowns by art form, state location, coverage, and arts practice area. The list of organisations in Appendix 3 shows the specific details for each organisation.

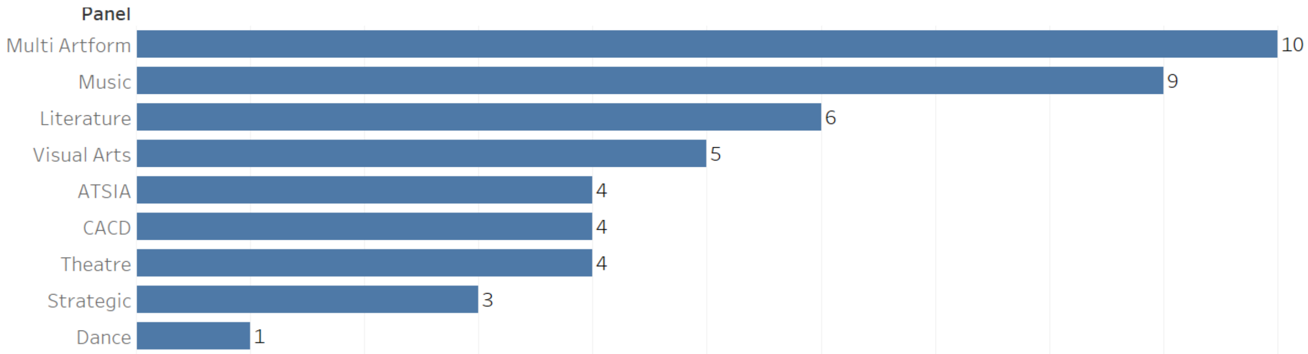
In total, 111 organisations were identified as falling within the definition of a service organisation developed for this report. Of these, 46 are national level organisations, 52 serve a single state, and 13 serve smaller geographic areas.

National Organisations

The majority of organisations in the scan (59%) provide services to a defined geographic area – either an entire state or a smaller geographic area – and these supplement the services provided throughout the country by the national organisations.

A total of 46 service organisations are classified as having reach across multiple states/territories or across the whole country, ten of which are Multi-Artform organisations, and nine Music service organisations. The next largest group is Literature with six service organisations. Dance has the smallest number of service organisations working across multiple states/territories, with only one such organisation identified in the scan. This reflects the devolved model operated by Ausdance, in which a network of independently operated state-based organisations deliver services to this art form alongside the national organisation.

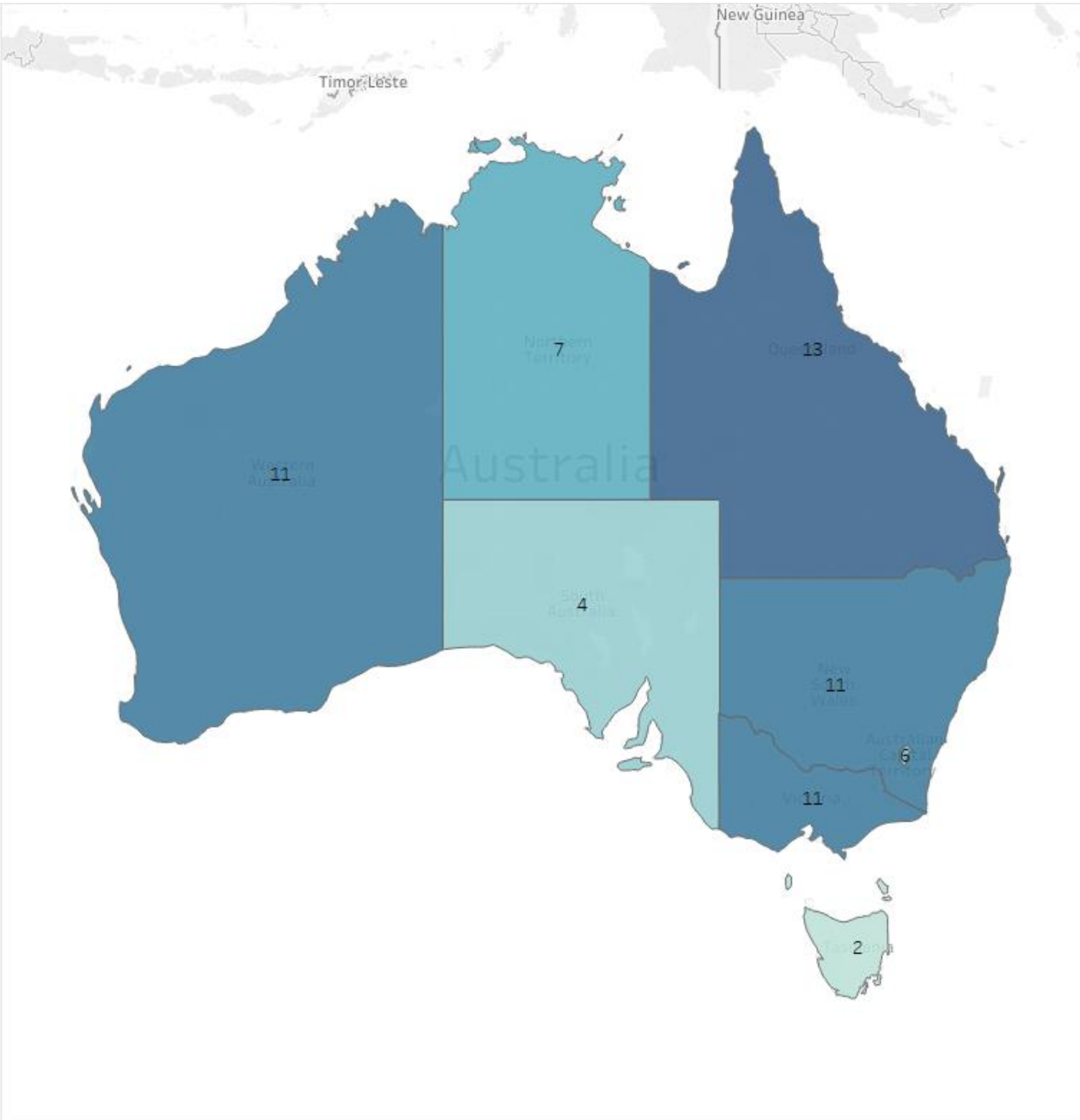
Chart 1: Number of national organisations by arts practice area



State/territory service organisations

Based on the 65 organisations in the scan that were identified as serving state or regional areas within a state, Queensland has the most organisations with 13 organisations. New South Wales, Victoria, and Western Australia have the next highest number of organisations with 11 each. The Northern Territory has seven organisations, and the Australian Capital Territory six. South Australia and Tasmania have the lowest total numbers of identified service organisations with 4 and 2 organisations respectively.

Chart 2: Number of state/territory organisations (state/territory and regional)



Service Organisations by Arts Practice Area

Panel	National	State	Regional	Grand Total
ATSIA	4	3	4	11
CACD	4		2	6
Dance	1	5		6
Literature	6	8	3	17
Multi-Artform	9	13	4	26
Music	9	9		18
Strategic	4	2		6
Theatre	4	1		5
Visual Arts	5	11		16
Grand Total	46	52	13	111

Analysed by arts practice panel, the scan identified organisations with national scope operating within each arts practice area. State level organisations were identified for all but one area. Organisations with regional scope were only identified for four of the nine arts practice areas. The following presents an analysis by each panel of the organisations in the scan.

Multi-Artform

The Multi-Artform sector comprises the largest group of organisations in the scan, with 27 organisations (24% of all organisations). Almost half of these are state-specific in scope. The majority of organisations identified in this category included those with a strong focus on supporting accessibility, touring, and serving artists and arts organisations in regional and remote areas.

Music

The Music sector is the second most represented sector in the scan, and the largest single artform sector, with 18 organisations. Organisations identified in the scan are of either national or state scope, with national organisations being directed to subsectors of the music industry (e.g. symphonies or artist managers) at a national level, and state organisations covering the whole music sector in their state.

Literature

Literature comprises the third largest group in the scan, with 17 organisations represented, the majority being state and regional writers’ centres.

Visual Arts

Visual Arts service organisations in the scan are balanced towards state level organisations, with most of these 11 state organisations being focused either on the crafts or on services to museums and galleries.

ATSIA

The ATSIA sector is almost equally split between national, state, and regional organisations, most of which provide services to arts centres and artists within a specific geographical area. Two of the national organisations focus on serving Indigenous artists working in specific art form practices.

CACD

Only six organisations were identified for the CACD sector, of which four were of national scope. Of these, half focus on the links between the arts and particular areas of society and policy, with the other half being more general in scope.

Dance

The Dance sector is represented by six organisations in the scan, all of which are part of the Ausdance group of organisations (one national organisation and five state level organisations).

Strategic

The Strategic sector comprises five organisations working across all art forms, but focused on a specific element of arts practice, such as legal issues or capacity building. Only two of these organisations operate at a state level.

Theatre

The Theatre sector had the least number of identified organisations, with five in total, four of which are national in scope. Of these, two target scriptwriters, two are general sector organisations, and one serves the subsector of physical theatre.

ANALYSIS: ACTIVITIES

The following section presents a broad categorical analysis of the organisations in the scan. It looks at the types of services identified as being delivered by these organisations, with an examination of services which have high levels of delivery, services that have low levels of delivery, and complementary service combinations. Importantly, no analysis of value of services from individual organisations is provided.

Activity Groups

Table 2 presents a breakdown of the services delivered by the organisations in the scan, grouped together into service categories. Member Communications is the largest group in the scan, with over 97% of organisations identified as undertaking activities in this area.

Table 2: Activity Groups Delivered

Activity Groups Delivered	Number of Organisations	% of Organisations
Member Communications	108	97.30%
Capacity Building	92	82.88%
Member Promotion	88	79.28%
Sector Leadership	73	65.77%
Member Income Generati..	66	59.46%
Advocacy	48	43.24%
Research and Evaluation	40	36.04%
Public Communications	39	35.14%
Devolved Programs	32	28.83%
Industry Standards	15	13.51%
Other Services	78	70.27%
Grand Total	111	100.00%

A complete list of all activities and their prevalence in the scan is provided as an appendix to the report (Appendix 2: Activities Delivered).

Member Communications

Member Communications is the most common category identified in the scan, with over 97% of organisations undertaking activities in this area. These communication activities are primarily engagement with members through social media, and the distribution of member newsletters and magazines. The position of this category as the most common service group is not unexpected, considering that engagement with services users is effectively essential to the delivery of other services.

Capacity Building

The next largest category of activities is Capacity Building activities, which are conducted by nearly 83% of service organisations. The most common activity is Professional Development (conducted by 63% of all organisations in the scan), followed by the development and provision of Toolkits (47% of all organisations). 34% of all organisations in the scan deliver mentoring programs.

Member Promotion

This category of activities comprises the third largest group of activities by service organisations, with direct member promotion and advertising being the most common activity (50% of all organisations undertake this activity). 35% of all organisations in the scan were identified as delivering awards programs.

Sector Leadership

Sector Leadership activities are primarily delivered through conferences and workshops, with 66% of all organisations in the scan delivering these activities. Delivery of sector networks also featured strongly, with 37% of all organisations undertaking this work. However, only 5% of organisations were identified as providing representation on boards, and only one organisation in the scan provides mediation services.

Member Income Generation

This category of activities is most strongly driven by the provision of jobs and grants banks to members (32% and 19% of all organisations in the scan). Direct income generation activities were less common, with 23% of all organisations providing scholarships or fellowships, and only 13% providing retail services.

Advocacy

Advocacy was identified as being delivered by over 43% of organisations in the scan. This advocacy is primarily driven by submissions to enquiries (22% of all organisations), and meetings with decision makers (19% of all organisations). Only 8% of organisations in the scan were identified as undertaking public campaigns.

Research and Evaluation

The category of Research and Evaluation is primarily driven by sector surveys and evaluations of programs (18% and 13% of all organisations respectively). The scan observed less activity in the areas of policy research (9% of all organisations) and impact studies (6% of all organisations).

Public Communications

Public Communications activities is lower than expected, with 35% of organisations identified in the scan undertaking activities in this area. The most common activity in this category is the provision of media releases (21% of all organisations); there are opportunities for organisations to deliver greater engagement with the public through public forums and articles such as op-eds.

Management of Devolved Programs

This category of activities is predominantly driven by service organisations acting as a guarantor and/or administrator of grants on behalf of members (23% of all organisations).

Industry Standards

Industry Standards represents the least active category, though this is not unexpected as it is common for standards relating to a particular element of practice or arts practice area to be monitored by a single organisation. The predominant activity in this category is developing and monitoring industry codes (10% of all organisations identified in the scan).

Other Services

The variety of organisations and target groups identified in the scan meant that there were many activities which did not readily fall into one of the above categories. Within these other services, the most common identifiable service was consulting (17% of all organisations), followed by equipment and space hire (14% of organisations). However, many other services were not otherwise classifiable – 53% of all organisations in the scan were identified as conducting some activity that did not fit within the classification scheme. This reflects the capacity of organisations to identify, create and tailor activities to the needs of stakeholders.

Complementary Activities Analysis

A further question relating to the scan of activities was whether there are particular complementary activities or activity groups which service organisations tend to provide alongside each other.

To identify complementarity in this analysis, a two element “market basket analysis” was applied. This analyses all possible pairs of activity groups and all possible pairs of activities, looking at three factors:

- Frequency: How often the pair of activities occurred
- Confidence: The probability that if an organisation undertakes one activity in a pair, that they undertake the other activity in the pair
- Lift: How much the pairing differs from random expectation

Assessed in combination these three factors can identify pairings which display a high degree of complementarity.

Five activity groups were identified from the market basket analysis that displayed high degrees of complementarity with other activity groups. Further analysis explored pairings of individual activities[7]:

1. If an organisation delivers **Public Communications services**, then it is more likely to also undertake activities in Research and Evaluation (particularly the pairing of media releases and sector surveys), and in Advocacy (the pairings of media releases and submissions to inquiries, and media releases and meetings with key decision makers). This is not unexpected from the perspective that effective public communications relies on a sound evidence base, and that there are synergies between public communications and advocacy activities (such as media releases and public campaigns).
2. If an organisation delivers activities relating to **Industry Standards**, then it is more likely to also undertake activities relating to Research and Evaluation (sector surveys), Advocacy (submissions to inquiries), and Sector Leadership (sector networks). Again,

[7] Activity pairs from the same activity group were excluded here as it was observed that most have inherent complementarity by being in the same group. Activity pairs with less than five organisations were also excluded due to the small sample size.

this is not wholly unexpected, as effective provision of such standards is reliant on both an evidence base and the support of key stakeholders.

3. An organisation that manages **Devolved Programs**, and in particular acts as guarantor or administrator on grants, is more likely to undertake Advocacy activities (meetings with key decision makers, lobbying, and submissions to inquiries). It is not immediately clear as to the drivers behind this observed complementarity, though it may relate to the high degree of involvement in the operation of grants programs caused by activities such as acting as a guarantor on grants for other parties.
4. An organisation that delivers **Capacity Building** activities is more likely to also deliver Advocacy activities. This complementarity was not driven by a few pairs of activities, but was consistent across all activities in these groups. That being said, only 48% of organisations in the scan that undertake Capacity Building activities also undertake Advocacy activities – what the complementarity analysis indicates is that this figure is higher than what would be expected. The driver of this increased complementarity is not clear.
5. Organisations undertaking **“Other Activities”**, specifically consulting services, were more likely to undertake Advocacy activities in the form of submissions to inquiries and meetings with key decision makers, and provide Member Income Generation services in the form of job and grant banks.

ANALYSIS: BUSINESS MODELS FOR SERVICE ORGANISATIONS

This section considers the mix of dedicated service organisations from two perspectives. Firstly, it considers business models for service organisations as a function of the number of activities that they deliver, and presents a categorisation of models for organisations based on an analysis of the organisations in the scan. The second part of the section considers potential business models for service organisations from the perspective of earned revenue sources, looking at different mechanisms for underwriting the costs of delivering service activities.

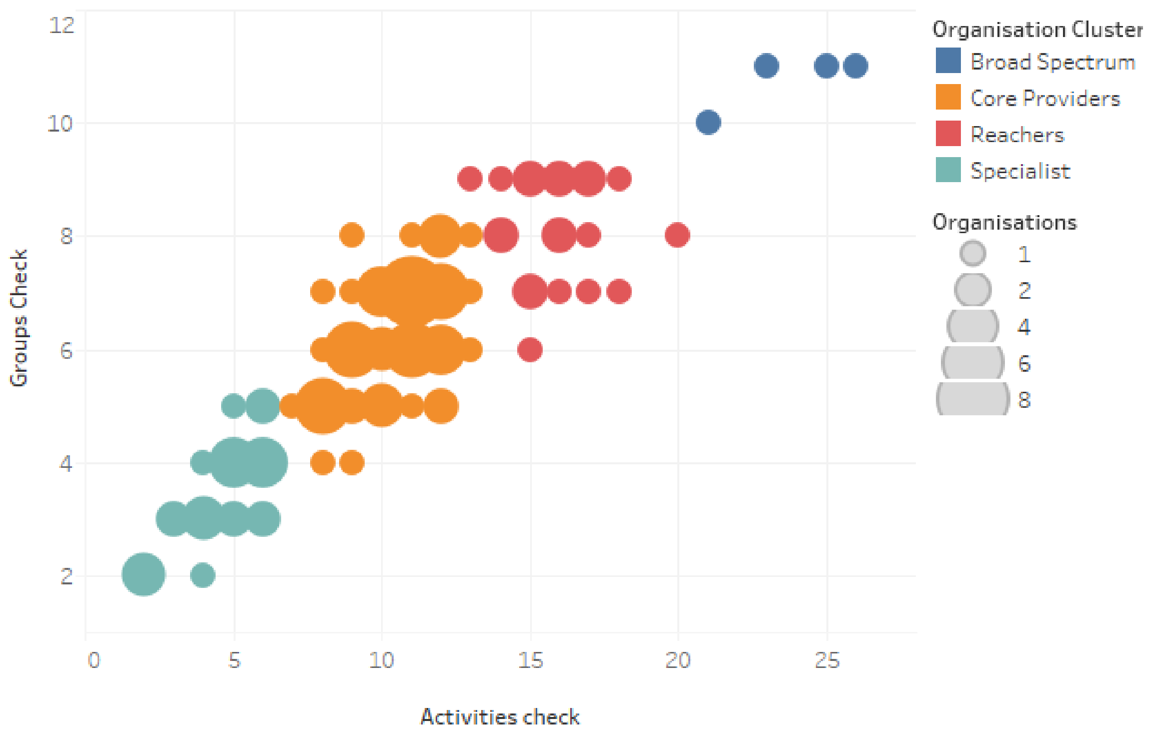
It must be noted from the outset that there is no “right” business model for a service organisation. Furthermore the business models presented are not mutually exclusive, with different combinations of revenue generation mechanisms being possible depending on the activities and the demand of the marketplace.

Business Models by Activity

The first analysis of business models examines how service organisations develop the range of their service offering. In the context of this scan, this can be expressed in terms of the number of individual activities that an organisation delivers and the number of activity groups that an organisation covers.

The service organisations analysed in the scan were examined in terms of these factors to assess the level of variation between organisations. The chart below plots the number of activities against the number of activity groups for each of the organisations in the scan.

Chart 3: Plot of activities against number of activity groups



Based on the chart, it is possible to split the organisations into four separate clusters based on the number of activities and the number of activity groups. These represent different business models for service delivery in the sector. The closeness of the clusters indicates that organisations can readily move from one group to the other based on changes in their service delivery over time. Each of the clusters is described below:

- **Specialist (22% of organisations):** These organisations deliver less than seven activities across two to five activity groups. Analysis of the organisations in this cluster shows a strong focus on providing a few services alongside basic communications to members (social media and member newsletters). These organisations are essentially niche providers, meeting a specific need of a sector or stakeholder group.
- **Core Providers (55% of organisations):** These organisations make up the majority of organisations in the scan, delivering between seven and 13 activities across four to eight activity groups, 7-13 activities. Analysis of the organisations in this group show delivery of a standardised range of services to stakeholders, particularly in the areas of member communications, capacity building, member promotion, sector leadership, and member income generation.
- **Reachers (19% of organisations):** This group of organisations are substantially similar to the core providers in terms of the number of activity groups (between six and nine), but differ in terms of the number of activities delivered (between 13-20). This group represents organisations that have expanded their range of services to stakeholders within activity groups by adding complementary activities within those groups. In general, this process of expansion occurs as a result of market demand, the development of company expertise over time, and the need to differentiate service offerings from competitors.
- **Broad Spectrum (4% of organisations):** This is the smallest group identified in the scan, and represents the few organisations that deliver services across ten or more groups, and with more than 21 activities. These organisations cover virtually every area of service provision, and act as a “one stop shop” for members. The relative rarity of such organisations arises from the fact that there needs to be sufficient market demand for the range of services, along with sufficient organisational capacity in order to deliver those services effectively.

Business Models by Revenue Source

In considering the contribution of earned revenue to an organisation, there are three identified methods of providing services. Notably, combinations of these methods are possible, at scales from the level of the activity to the entire organisation. For example a membership-based organisation may also offer services that require a fee (e.g. conferences), while also offering free activities to the broader market.

Unfortunately, no data on the models for revenue generation were available from information in the scan at this level of detail. Furthermore, collecting such data was beyond the scope of the study. However, an analysis of the revenue models is considered important to consider as part of the scan in order to acknowledge and understand potential drivers of activity selection and provision by organisations.

- **Membership:** The first model for consideration is membership, in which organisations or individuals pay a lump sum fee on a regular basis in order to gain access to a slate of services (and in some cases, participate in a closed network). In order to make a significant contribution to the overall revenue mix of an organisation, this fee has to be substantial in nature. This differentiates it from the token membership fees levied as a regulatory requirement of incorporated associations.

Memberships delivered by an organisation can themselves be delivered using different models. As one example, an organisation may levy a single charge for access to all services; another may have different tiers of membership corresponding to the number of services available, or the particular status of the member (e.g. individual or organisation). A consideration across all models is that membership-driven models are less responsive to general market demand as they offer a basket of services – service organisations that adopt this model face a need to optimise their mix of services to reflect the needs of existing members and the wider market.

- **Pay as You Go:** The second model for consideration is a model in which artists or organisations pay a fee for services on an ad hoc basis, as and when they make use of the service. This can include activities where that fee is discounted or waived for members. The advantages of such models is that it can cover more infrequent or one off activities, and it can be more responsive to the market needs at a service level. However, because such activities are paid for in isolation, they may be less connected with other services offered by an organisation.
- **Free:** This category covers fully subsidised activities that are offered by an organisation at no cost to the recipient. This can be applied at the level of an organisation where the services are incompatible with revenue generation through fees or the market is unable to bear the costs of payment for the service. It is also applicable at the level of the activity, for example as a loss leader to solicit membership or to build the market profile of the organisation.

ANALYSIS: INTERNATIONAL MODELS FOR SERVICE SUPPORT

To place the analysis in a broader context the scan incorporated a review of arts councils in other countries with the aim of understanding the service organisation landscape in these markets and how approaches to support are implemented. The five countries identified for this review were New Zealand, England, Scotland, the United States and Canada. The organisations reviewed were:

- Arts Council England
- Canada Council for the Arts
- Creative Scotland (formerly Scottish Arts Council)
- Creative NZ
- National Endowment for the Arts (USA)

Information on the funding programs available and the service activities offered was collated through desktop research of publicly available documents, mainly sourced from the organisation websites.

A qualitative evaluation regarding the outcomes and benefits of the different programs and models was not possible within the scope of the current work, particularly as some of the programs are in the early stages of delivery and outcome data is not available.

In summary, international models cover a range of operational and project-based support programs, some of which target organisations or activities which provide services to the arts. However, there is not a dominant model in place for delivering support to service organisations.

England: Arts Council England

Arts Council England announced a realignment of their organisational funding programs ("National Portfolio") in 2016 with assessment process to be concluded in 2017. As part of this realignment, four streams of funding were created with funding to commence in the 2018/19 financial year.

The streams comprise three bands of operational funding (differentiated by the size of funding and the compliance requirements for each band), and a separate project funding stream targeting "sector support organisations". Specifically:

"Sector Support Organisations will apply for activity that focuses on offering support services to our sector, as opposed to producing or delivering art and culture.[8]"

Organisations applying under this stream of support can seek a minimum of £40,000 per year in support. Support provided to the organisation is directed to the activity delivered by the organisation, rather than to the general operating costs of that organisation. As a result, organisations can apply for both a delivery role within one of the three general streams of funding and also to fulfil the role of a Sector Support Organisation.

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[8] http://www.artscouncil.org.uk/four-national-portfolio-categories/sector-support-organisations

Under the definition, Sector Support Organisations can include organisations that work in the area of arts and cultural education, umbrella and networking organisations, strategic library and museum partnership bodies, and other organisations that support the arts and cultural sector as part or all of their function. As such eligibility extends beyond the dedicated arts service organisation covered in this scan.

It is worth noting that some service organisations in England have developed their business models outside of the funding model of Arts Council England. As an example, What Next has established itself as a key advocacy group in the absence of Arts Council England financial support.

Canada: Canada Council for the Arts

A new framework for funding by the Canada Council for the Arts will be implemented from 2017. It incorporates four main programs which are aimed at supporting artistic practice for a specific sector or broad purpose, as opposed to activity-specific grants. The selection process for the majority of funding programs is a peer-assessed competitive funding model analogous to that employed by the Australia Council.

There are two programs targeting organisations which provide services to the arts "Supporting Artistic Practice: National Arts Service Organisations" and "Supporting Artistic Practice: Support Organisations".

The 3-year National Arts Service Organisations program supports member services, networking, shared learning, research and analysis for the sector to organisations providing services and activities that strengthen the professional arts sector on a national basis.

The Support Organisations program, also over three years, is directed at organisations providing targeted development of a particular artistic practice, groups of artists or arts organisations through services such as improving professional capacity, learning, networks and reaching a public.

Scotland: Creative Scotland (formerly Scottish Arts Council)

The Creative Scotland 10 Year Plan outlines ambitions (such as excellence and accessibility), priorities, and connecting themes (such as creative learning, digital, equality, diversity and environment) which must be addressed by applicants for either regular or project funding.

Regular Funding provides stable support over a 3-year period for organisations making a contribution to the development of the arts, screen and creative industries. Funding decisions are made by Creative Scotland, sometimes in consultation with the relevant local authority.

Open Project Funding supports individuals and arts organisations in skill development, artistic practice, new work, audience engagement and participation.

Neither of these funding streams specifically target organisations providing services to the arts; instead, all arts organisations are eligible.

New Zealand: Creative NZ

There are two main multiyear funding programs run by Creative NZ, Arts Leadership Investment (Toi Totara Haemata) and Arts Development Investment (Toi Uru Kahikatea). Leadership investment grants for organisations are for two to five years, and development investment grants are for one to three years. The main activities supported are development of new work, touring (national and international), collaboration between organisations and professional development. There is not a specific stream of funding that targets service organisations.

Creative NZ also provides workshops and toolkits to increase the capacity of arts organisations. Workshops topics include audience and market development, strategic plans, digital strategies and governance. Toolkit topics include governance, Google analytics, volunteer management, international strategy, risk management, advocacy and donations.

In most cases Creative NZ staff assess applications and make final funding decisions. However, for some programs external assessors are involved in the assessment process.

United States of America: National Endowment for the Arts

The National Endowment for the Arts does not directly deliver operational funding programs. Its support is delivered through project grants and fellowships to artists and organisations, and through funding that is devolved to state and regional arts agencies for administration.

In general, the funding model in the United States does not include operational support from state or national government sources. As such, service organisation business models are predominantly reliant on private sources of revenue. As an example Americans for the Arts, a peak arts advocacy body, derives approximately 47% of its revenue from philanthropic sources, with the remainder coming from memberships, fee-based services, and investment income.

APPENDIX 1: METHODOLOGY

The research and data gathering for the Service Organisations Scan was conducted by the Research and Knowledge Management team at the Australia Council. The approach combined both desk research to gather information about organisations providing services to the arts sector in Australia and surveys to canvas the views of art sector experts at the Australia Council and at state government arts and cultural agencies. Both phases were carried out concurrently.

Phase 1: Desktop scan of service organisations

1.1 – Four year funding data analysis

Organisations which applied for the Four Year Funding program provided significant data to the Australia Council on their operations and activities, which were analysed to build an understanding of the service organisation landscape.

1.1.1 – Quantitative data analysis
The applications for the Four Year Funding contained breakdowns of quantitative data relating to the financial positions, budgets and staffing of each of the applicant organisations. Raw data from applications was exported from the GMS database and key metrics identified and analysed for each of the service organisations.

1.1.2 – Activity scan
Applicants for the Four Year Funding were also required to supply copies of their strategic plan documents for assessment. These plans contained information on the activities and programs that they offer to stakeholders. Based on a broad structure provided by ArtsPeak, a list of activity types was created (see Table 1), and a desktop scan of each of the strategic plans was undertaken to classify the activities of each service organisation within this list.

1.1.3 – Arts Practice Directors survey
The assistance of the Arts Practice Directors of the Australia Council was sought to understand their perceptions of the service organisation landscape within their sectors. This helped articulate the 'big picture' around service in the arts by including consideration of services and organisations not funded by the Australia Council. A survey instrument probed the following:

- What services are currently used by artists, groups and organisations in the sector?
- What services are needed by artists, groups and organisations in the sector?
- Which service organisations currently provide these services? (identified organisations were then analysed through desktop research to determine the extent of services provided)
- Are there gaps in the sector in terms of service provision (e.g. to a stakeholder group, geographical area, or type of service)?
- What are the strengths, weaknesses, opportunities, and threats for stakeholders in the sector?

- What are perceived future needs of the sector and how should service organisations deliver services in 4 years?
- Are there operational models for service organisations in other sectors that are good points of reference for your sector?

1.2 – Six year funding EOI service orgs

The expression of interest phase of the superseded Six Year Funding model received a larger number of applications than the Four Year Funding round and included a broader range of service organisations, including smaller organisations. This element of the project analysed the EOI cohort to identify service organisations, and gathered available quantitative and qualitative information on their activities using desktop research.

1.3 – Benchmarking

To place this analysis in a broader context, benchmarking was undertaken against international markets (New Zealand, Canada, England, USA and Scotland) to better understand the service organisation landscape and operations in these markets, and how it compares with the Australian model.

Phase 2: State Arts Agency Scan

The second phase, run in parallel with Phase 1, entailed contacting state and territory funding agencies in order to identify service organisations in the arts that had not been captured in Phase 1. These organisations were analysed using the same combination of quantitative analysis (using a template provided to states either as an Excel file or online instrument) and strategic plan activity review. Expert staff from the state and territory funding agencies also completed a survey similar to that given to the Arts Practice Directors, but directed towards gathering information at a state level.

Geographic coverage definitions used in the scan

It is worth noting that while an organisation may be located in a particular city or state, this does not necessarily provide an accurate reflection of the geographic coverage which the organisation’s services reach.

For this work, organisations were classified according to the geographic ‘reach’ of their services as:

- National: organisations that provide services across Australia or whose geographic scope extends across multiple states. For example Desart’s services reach Queensland, Western Australia and the Northern Territory, and they act as an ATSIA peak body for a significant number of the art centres it represents in those states.
- State/Territory: organisations that provide services across a single state or territory but not outside that state or territory.
- Regional: organisations that provide services over one or more geographical areas within a single state or territory but not across the entire state or territory. This can include organisations that operate within a metropolitan area, for example Western Sydney.

The list of organisations in Appendix 3 contains details of the geographic coverage classification applied for each organisation in the dataset.

Artform Definitions Used in the Scan

Organisations were allocated to one of nine arts practice areas according to their art sector focus, using the Australia Council assessment panels as a starting point to categorise and define these areas. An additional segment was created to capture organisations that focus on strategic services that are applicable across all art forms, such as legal services and administrative training.

A further segment was created to capture organisations that provide services to stakeholders in more than one arts practice area. This Multi-Artform area includes organisations that serve artists working in multiple arts practice areas as well as organisations that serve artists working in emerging and experimental fields of artistic practice.

Community Arts and Cultural Development was given a definition consistent with its application in the Australia Council. Under this definition, an organisation in this area provides services to organisations and individuals who in turn deliver outputs which involve professional artists working directly with a community of people with a shared characteristic (such as ethnicity, age, disability or gender). These outputs must be co-determined by that community, and delivered programs must be led in part or in whole by that community.

The arts practice areas used in the scan are:

- Aboriginal and Torres Strait Islander Arts (ATSIA)
- Community Arts and Cultural Development (CACD)
- Dance
- Literature
- Multi-Artform (including Emerging and Experimental Arts)
- Music
- Theatre
- Strategic
- Visual Arts

APPENDIX 2: ACTIVITIES DELIVERED

Activities Delivered	Activity Groups Delivered	Number of Organisations	% of All Organisations	% of Organisations in Activity Group
MC: social media	Member Communications	105	94.59%	97.22%
MC: member newsletters/magazines	Member Communications	95	85.59%	87.96%
CB: professional development	Capacity Building	70	63.06%	76.09%
SL: conferences/workshops	Sector Leadership	68	61.26%	93.15%
O: other misc services	Other Services	59	53.15%	75.64%
MP: member promotion/advertising	Member Promotion	55	49.55%	62.50%
CB: toolkits	Capacity Building	52	46.85%	56.52%
SL: Sector networks/groups	Sector Leadership	41	36.94%	56.16%
MP: awards	Member Promotion	39	35.14%	44.32%
CB: educational offerings	Capacity Building	38	34.23%	41.30%
CB: mentoring programs	Capacity Building	38	34.23%	41.30%
MP: facilitated exhibitions	Member Promotion	37	33.33%	42.05%
MIG: jobs banks	Member Income Generation	35	31.53%	53.03%
MP: featured artist programs	Member Promotion	31	27.93%	35.23%
A: submissions to inquiries	Advocacy	26	23.42%	54.17%
DP: acting as guarantor/administrator on grants	Devolved Programs	25	22.52%	78.13%
MIG: scholarships/fellowships	Member Income Generation	25	22.52%	37.88%
PC: media releases	Public Communications	23	20.72%	58.97%
A: meetings with key decision makers	Advocacy	22	19.82%	45.83%
MIG: grants banks	Member Income Generation	21	18.92%	31.82%
RE: sector surveys	Research and Evaluation	20	18.02%	50.00%
CB: peer-to-peer knowledge sharing	Capacity Building	19	17.12%	20.65%

A: lobbying	Advocacy	16	14.41%	33.33%
A: other advocacy activities	Advocacy	15	13.51%	31.25%
O: equipment/space hire	Other Services	15	13.51%	19.23%
PC: public forums	Public Communications	15	13.51%	38.46%
MIG: retail	Member Income Generation	14	12.61%	21.21%
RE: evaluations	Research and Evaluation	14	12.61%	35.00%
O: touring/presenting service	Other Services	13	11.71%	16.67%
PC: other articles	Public Communications	13	11.71%	33.33%
IS: developing/monitoring industry codes of practice	Industry Standards	11	9.91%	73.33%
A: public campaigns	Advocacy	10	9.01%	20.83%
DP: initiating/managing programs on behalf of other stakeholders	Devolved Programs	10	9.01%	31.25%
RE: policy research	Research and Evaluation	10	9.01%	25.00%
MIG: artist fees	Member Income Generation	9	8.11%	13.64%
A: action groups	Advocacy	7	6.31%	14.58%
RE: impact studies	Research and Evaluation	7	6.31%	17.50%
O: licensing fee/royalty collecting service	Other Services	6	5.41%	7.69%
RE: other research	Research and Evaluation	6	5.41%	15.00%
IS: accredited training	Industry Standards	5	4.50%	33.33%
O: software/web platform development	Other Services	5	4.50%	6.41%
SL: representation on boards	Sector Leadership	5	4.50%	6.85%
DP: managing sector-wide schemes	Devolved Programs	3	2.70%	9.38%
MC: journals	Member Communications	3	2.70%	2.78%
MC: other communications	Member Communications	1	0.90%	0.93%
SL: mediation	Sector Leadership	1	0.90%	1.37%

APPENDIX 3: LIST OF ORGANISATIONS

Organisation	Panel	Coverage	Location
ACT Writers' Centre	Literature	State	ACT
Aboriginal Art Centre Hub of Western Australia	ATSIA	State	WA
Access Arts QLD	Multi Artform	State	QLD
Access2Arts	Multi Artform	National	SA
Accessible Arts Inc (NSW)	Multi Artform	State	NSW
Ananguku Arts & Cultural Aboriginal Corporation	ATSIA	State	SA
ArTour	Multi Artform	State	QLD
Arnhem Northern and Kimberley Artists Aboriginal Corporation (ANKA)	ATSIA	National	NT
Art Association of Australia and New Zealand	Visual Arts	National	VIC
Art from the Margins	Multi Artform	Regional	QLD
Artback NT	Multi Artform	State	NT
Arts Access Australia Limited	Multi Artform	National	TAS
Arts Law Centre	Strategic	National	NSW
Arts Nexus Inc	CACD	Regional	QLD
Arts On Tour - NSW Ltd	Multi Artform	State	NSW
Artsource	Visual Arts	State	WA
Artspeak	Multi Artform	National	NSW
Ausdance ACT	Dance	State	ACT
Ausdance National (trading as Australian Dance Council - Ausdance Inc)	Dance	National	ACT
Ausdance QLD	Dance	State	QLD
Ausdance VIC	Dance	State	VIC
Ausdance WA	Dance	State	WA
Australasian Performing Right Association Ltd (APRA)(Sounds Australia)	Music	National	NSW

Australian Circus and Physical Theatre Assoc.	Theatre	National	VIC
Australian Copyright Council	Strategic	National	NSW
Australian Dance Council (NSW)	Dance	State	NSW
Australian Independent Record Labels Association Ltd (AIR)	Music	National	VIC
Australian Major Performing Arts Group	Multi Artform	National	NSW
Australian Music Centre Ltd	Music	National	NSW
Australian Music Industry Network	Music	National	QLD
Australian National Capital Artists Inc (ANCA)	Visual Arts	State	ACT
Australian Performing Arts Centres Association	Multi Artform	National	WA
Australian Poetry	Literature	National	VIC
Australian Publishers Association Ltd	Literature	National	NSW
Australian Recording Industry Association	Music	National	NSW
Australian Script Centre	Theatre	National	TAS
Australian Society of Authors Ltd (The)	Literature	National	NSW
Australian Writer's Guild	Literature	National	NSW
Baluk Arts	ATSIA	Regional	VIC
Band Associations	Music	State	NSW
BlakDance Australia Ltd	ATSIA	National	QLD
Broadsheet	Multi Artform	National	VIC
Centre for Youth Literature	Literature	National	VIC
Charttes Training Advisory Council	Strategic	State	NT
Circuit West	Multi Artform	State	WA
Community Music Victoria Inc	Music	State	VIC
Contemporary Art Organisations	Visual Arts	National	NSW

Country Arts WA	Multi Artform	State	WA
Craft ACT	Visual Arts	State	ACT
Craft Queensland (t/u artisan)	Visual Arts	State	QLD
Crafts Council NT (Tactile Arts)	Visual Arts	State	NT
Creative Recovery Network Inc	CACD	National	QLD
Creative Regions Ltd	CACD	Regional	QLD
Cultural Development Network Inc	CACD	National	VIC
Desart Inc	ATSIA	National	NT
Design Tasmania	Visual Arts	National	TAS
Express Media	Literature	National	VIC
Feral Arts Corp Ltd	CACD	National	QLD
First Nations Australia Writers Network	ATSIA	National	NSW
Flying Arts Alliance	Visual Arts	State	QLD
Guildhouse Inc	Visual Arts	State	SA
Indigenous Art Centre Alliance	ATSIA	Regional	QLD
Indigenous Art Code	Strategic	National	NSW
Kimberley Aboriginal Law and Cultural Centre (KALACC)	ATSIA	Regional	WA
Kultour	Multi Artform	National	VIC
Live Performance Australia	Multi Artform	National	VIC
Logan West Community ArtShare Alliance	Multi Artform	Regional	QLD
Marthakal Homelands Resource Centre trading as Elcho Island Arts	ATSIA	Regional	NT
Multicultural Arts VIC (MAV)	Multi Artform	State	VIC
Museum and Gallery Services Queensland Ltd.	Visual Arts	State	QLD
Museums & Galleries NSW	Visual Arts	State	NSW

Museums Australia WA	Visual Arts	State	WA
Music ACT	Music	State	ACT
Music Council of Australia Pty Ltd (Music Australia)	Music	National	NSW
Music NT Inc	Music	State	NT
Music SA	Music	State	SA
Music Tasmania	Music	State	TAS
Music Victoria	Music	State	VIC
NSW Writers Centre Inc	Literature	State	NSW
NT Writers Centre	Literature	State	NT
National Association for the Visual Arts (NAVAs)	Visual Arts	National	NSW
New Music Network	Music	National	NSW
Performing Lines WA	Multi Artform	State	WA
PlayWriting Australia	Theatre	National	NSW
Propel Youth Arts	Multi Artform	State	WA
Public Galleries Association VIC	Visual Arts	State	VIC
Queensland Writers' Centre	Literature	State	QLD
Red Hot Arts (RHACA)	Multi Artform	Regional	NT
Regional Arts Australia (trading under Arts Council of Australia)	Multi Artform	National	NT
Regional Arts NSW	Multi Artform	State	NSW
Regional Arts Victoria	Multi Artform	State	VIC
SA Writers' Centre	Literature	State	SA
SAMAG	Multi Artform	Regional	NSW
Songlines Music Aboriginal Corporation	ATSIA	State	VIC
South Coast Writers Centre	Literature	Regional	NSW

Symphony Services International	Music	National	NSW
Tasmanian Writers' Centre Inc	Literature	State	TAS
The Association of Artist Managers	Music	National	NSW
The Childers Group	Strategic	State	ACT
The Institute for Creative Health	CACD	National	NSW
The Push Inc	Music	State	VIC
The Song Room Inc.	Multi Artform	National	VIC
The West Australian Music Industry Association Inc	Music	State	WA
Theatre Network NSW	Theatre	State	NSW
Theatre Network Victoria Inc (t/u Theatre Network Australia)	Theatre	National	VIC
Townsville Writers and Publishers Centre	Literature	Regional	QLD
Victorian Association of Performing Arts Centres	Multi Artform	State	VIC
Viscopy	Visual Arts	National	NSW
Westwords	Literature	Regional	NSW
Writers VIC	Literature	State	VIC
Writing WA	Literature	State	WA