

Introduction

National portfolio organisations

The National Portfolio funding programme is our programme for organisations that are applying for funding over a four year period from 2018/19 to 2021/22 to deliver arts and cultural activity, as well as those organisations applying to support the arts, museums and libraries sector.

The application form asks you a series of questions about how you plan to contribute to the Arts Council's goals and about your organisation's management, governance and financial viability. We will use the information you give us in your application form to decide whether we will offer you a grant.

The next three screens are autofilled with information you have already provided. The purpose of these is for you to ensure the information is correct. If you need to make any amendments, you will need to go back to the applicants section and make amendments to your applicant profile.

Throughout the application portal, any items marked * must be completed.

Any free text boxes have a strict character limit. Please stick to this character limit as any additional text will be automatically deleted.

If at any time you would like to contact us, click contact us in the left menu bar for contact information.

Good luck with your application and save often.

Organisation details

Non-UK address or address not found: ☐

Address name or number: THE SAGE GATESHEAD,

Street: St Marys Square

Locality:

Town / city: GATESHEAD

Postcode: NE8 2JR

Main contact number:

Section 40 (2)

Email address:
(Organisation email address
if applicant is an organisation)

Website address: <http://www.sagegateshead.com>

Fax number:

Please select the option that most closely describes your organisation: Arts organisation

Select one of the options below to describe your organisation's status: Company limited by guarantee

Are you a registered charity? Yes

What is your charity number? 1087445

Is your organisation a Museum? No

Your contact information

Contact type	Main contact	First name	Last name	Primary contact number	Email
Grant administrator	Yes	Joseph	Timlin	Section 40 (2)	
Financial authority	No	Dominic	Parker		
Financial authority	No	Abigail	Pogson		

Contact details

Contact type: Grant administrator

Is this the main contact for the applicant? ☒

First name: Joseph

Middle name:

Last name: Timlin

Position: Trust & Statutory Fundraising Manager

Primary contact number: Section 40 (2)

Alternate contact number:

Mobile phone number:

Email address:

Fax number:

Contact details

Contact type: Financial authority

Is this the main contact for the applicant? ☐

First name: Dominic

Middle name:

Last name: Parker

Position: Director of External Relations

Primary contact number: Section 40 (2)

Alternate contact number:

Mobile phone number:

Email address:

Fax number:

Contact details

Contact type: Financial authority

Is this the main contact for the applicant? ☐

First name: Abigail

Middle name:

Last name: Pogson

Position: Managing Director

Primary contact number: Section 40 (2)

Alternate contact number:

Mobile phone number:

Email address:

Fax number:

Basic details

Information

What is your organisation or consortium's mission or purpose? No more than 2000 characters.

Sage Gateshead is for audiences, for artists, for the North and for the long-term. Our vision is to play an active part in contemporary culture, community and place through music. We achieve this with people of all ages and walks of life, as an international music organisation with deep northern roots.

Sage Gateshead is a young organisation, developing fast. We have consulted with audiences, partners, stakeholders and internally to develop this new vision and mission.

We deliver a programme of music known for excellence, innovation and inclusion. We are artist and participant led. We are a music centre for the 21st century with an iconic Foster + Partners building, a regional remit and a commitment to digital activity with five specialisms:

- o Programming and presenting concerts and festivals across genres
- o Royal Northern Sinfonia [RNS]
- o Folkworks
- o Creative Learning
- o Artist Development

In 2016 we delivered 488 concerts, 10 festivals, 9387 classes, 6212 schools sessions and 4670 sessions around the region. We streamed/broadcast 2 festivals. We hosted 61 private conferences & events, 26 weddings/private parties and 37 charitable events. We trained 94 artists and leaders, 32 Creative Apprentices, hosted 66 Placements, and gave free space to 45 artists through Artist Development initiatives.

Business plan priorities 18-22:

- o Develop audiences for music and increase cultural engagement in the North
- o Nurture and support a diverse range of artists
- o Maintain a resilient business model
- o Champion the North of England and its creative life

We believe that the early part of the 21st century will leave a legacy of fantastic music which is engaged, inspiring, and groundbreaking and created by a diverse range of artists. Of all the performing art-forms, we believe that music has the greatest potential to provoke dialogue and debate, cause us to reflect, bring communities together and build a sense of place. Sage Gateshead's role is to champion and broker this in and for the North.

Do you, or does your organisation object to receiving National Lottery funding for religious reasons? No

Requested amounts

Amount summary

	2018/2019	2019/2020	2020/2021	2021/2022	Total (£):
Amount requested (£):	£3,512,122	£3,512,122	£3,512,122	£3,512,122	£14,048,488

Contributing to our goals

To be considered for funding you must be able to help the Arts Council meet our goals. You must contribute to:

Goals: Goal 2: Everyone has the opportunity to experience and be inspired by the arts, museums and libraries, Goal 3: The arts, museums and libraries are resilient and environmentally sustainable, Goal 1: Excellence is thriving and celebrated in the arts, museums and libraries, Goal 5: Every child and young person has the opportunity to experience the richness of the arts, museums and libraries, Goal 4: The leadership and workforce in the arts, museums and libraries are diverse and appropriately skilled

Goal 1

**Tell us how you plan to use our funding to contribute towards Goal one.
No more than 20,000 characters.**

Excellence is thriving and celebrated in the arts, museums and libraries.

1. Introduction

Sage Gateshead plays an important role in Britain's cultural life, based in the furthest part of England from the capital. We combine world class facilities and acoustics, the highest calibre artists and innovative programming. We bring a level of ambition and quality in musicians and musical activity into the North and nurture local artists and audiences, increasing ambition and cultural confidence. Nationally Sage Gateshead plays an active role developing practice, in framing cultural debate from a northern perspective and in building international links from a region as opposed to London. Together with Baltic, we are uniquely placed as a focus for excellent artistic activity – a South Bank of the North.

1.1 Your support

We will use your funding to maintain and develop excellence in the following areas, playing an active part in regional and national cultural life:

- o Venue - a world class learning centre and concert venue in an iconic location, supported by a team delivering the highest levels of artist, technical and customer care. Our venue has acoustics which rank amongst the best in the world
- o Programming - high calibre musicians and concert & festival programming unique for its musical breadth and quality, its role in audience development in the north and its uniquely mixed economic model
- o Orchestra – RNS, England's leading chamber orchestra, for the quality of its playing, regional role and increasing international presence with Lars Vogt and Julian Rachlin
- o Art-form development - Folkworks' innovative role in folk development in the UK, focusing on blending contemporary and traditional practice and on engaging a new generation
- o Leadership - in inclusion and equality of opportunity, across all aspects of our work
- o Creative Learning – a specialism, which we want to note here as it is a key part of our excellence, but which we will describe in detail in our answer to Goal 5

1.1.1 Excellence evidenced

Excellence in each of these areas is demonstrated through consistently strong critical reviews, 96% audience satisfaction levels relating to quality of the music in our programme and the quality of the musical experience in our venues, artist feedback and the progression of young people through from learners to programmers and artists.

Feedback:

"Honoured to be back in this magical place...the total thrill! You're one of the best rooms on the planet, I dream of the next time. Love always KT Tunstall"

"A million thank yous to everyone at the amazing Sage for helping us with Lau Land." Aidan O'Rourke Lau

"The new classical music season at Sage Gateshead began with a night of brilliance and effervescence in the main hall, Sage One... Lots to enjoy there. We should count our blessings." Chronicle, September 16

"Nothing says summer like three days of drinking and good music down on the banks of the Tyne with its usual blend of big hitters, new hopes and all manner

of pop-ups, free gigs and surprises" NARC

"Every time I visit this wonderful venue, I fall in love with it all over again ! My latest visit was on New Year's Eve to enjoy the festivities with Vintage Trouble (supported by Big Boss Man) Fantastic evening, really enjoyed it!" Paul Reason, Facebook 5* review

"Sage Gateshead is a world class music venue. Easy parking, good disabled access and best off all the great sound of Sage One. Great seating and an evening to remember. Will be there next week. Don't miss out enjoy a visit." Brian C, Trip Advisor

"@katerusby @Sage_Gateshead LOVED the livestream! Thank you #rusbyxmas" Twitter, Lindsey Cawrey @Cawrey

"The show at Cullercoats .@RNSinfonia, was #spellbinding! Amazing start to finish. Never seen/heard #Vivaldi like that - #Goosebumps galore!" Twitter, Roger Cook @Roj78, Baroque Christmas by Candlelight

"Q3: Was the concert what you expected? More than expected, great interaction with the children. Lots of energy and interaction." Survey Monkey, Linda Cummings, parent Classics4Kids

1.2 Structure and development of our programme of work

We structure our programme as follows:

IN SAGE GATESHEAD - a concert & festivals programme of contemporary & classical music and a programme of creative music learning.

BEYOND SAGE GATESHEAD – in communities across the north: engagement, partnership and participation activity in music and internationally: import & export of musicians and programmes.

Our different strands of activity:

- o Programming concerts & festivals
- o RNS
- o Folkworks
- o Artist Development Programme
- o Public & Community Engagement [Covered in our Goal 2 answer]
- o Young People's Programme [Covered in our Goal 5 answer]

Having developed a new vision and mission in 2016, we have also undertaken reviews of RNS/classical programming, Folkworks and Learning & Participation by reviewing our audience development goals and each programme's purpose and content.

Key developments for 18-22:

- o RNS will celebrate their 60th anniversary with a one-off programme for the 2018/19 season. Thereafter they will work towards being an international chamber orchestra for 21st century- contributing significantly to classical music programme at Sage Gateshead, complemented by a programme of visitors. These changes will clarify and focus RNS's identity to best serve the North and the national orchestral scene.
- o Folkworks will focus on three strands of work – live, digital and learning – with an emphasis on dialogue between traditional and contemporary practice re-

focusing its identity.

- o Our L&P programme will evolve into two areas of our core programme - Young People's Programme (increasing our Goal 5 focus) and Public & Community Engagement (increasing our Goal 2 focus).
- o We will put a significantly increased emphasis on artist development, focusing on international links and opportunities for local artists.
- o We will use the Great Exhibition of the North in Summer 2018 as a way of starting a dedicated annual summer season in our building, addressing a long-standing issue of how to programme this economically challenging summer period.

1.3 Programme summary

1.3.1 Venue programming

We will have a year-round programme of musical events in our three main spaces – Sage 1, Sage 2 and NRFH with c 320 concert per year reaching an audience of 300,000. We will programme across classical, jazz, folk, indie, rock, Americana, dance, soul and popular musics. Our programme will cater for a wide range of musical tastes and across our three different size spaces we are able to programme from mainstream through to niche artists. We will work with a wide range of programming partners including Music Beyond the Mainstream, Serious, Generator, European Concert Halls Association, GEM, Jumping Hot, Country to Country, BBC.

Artists we anticipate programming in this period include:

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We are increasing our family programming of our own and co-produced activity such as Baby Sinfonia, Classics 4 Kids, Folk for young ears, Big Sing for Mini Singers and through partnerships with New Writing North, BCMG, Manasamitra, Unfolding Theatre, Chalk, Mahogany Opera Group and Theatre Hullabaloo. In addition to this programming, we will also regularly ask visiting artists who have family friendly material to add a 4pm show with half of their programme to enable families to attend.

We will continue to develop our programme of festivals: New Year New Artists,

Section 43 (2)

Section 43 (2)

progra festival curated by Section 43 (2). We plan one themed festival per year around Creative Di ed below). We will also continue to nurture our festivals where the curatorial lead comes from others: TUSK, BBC Free Thinking, Thinking Digital in the Arts, Social Investment Festival, Brass In Concert.

There are two periods in which we will programme 'super festivals': Summer and Christmas. We plan to use the Great Exhibition of the North as a way of establishing a regular summer season; we will continue to develop our

Christmas programme to serve a large and wide audience. Both of these are key for new audiences and for attracting visitors to the region.

Across all of these programmes we will commission 20 new works and premiere 100 new works each year.

1.3.2 Royal Northern Sinfonia

2018/19 is the orchestra's 60th anniversary and the end of the first three-year term for Lars Vogt and Julian Rachlin as Music Director and Principal Guest. We will hold a special anniversary season with two themes – big names from the past (Simon Rattle, Mark Elder, Ivan Fisher) returning to perform iconic chamber orchestra pieces and a series of projects which look to the future. The theme will be 'Great past, Great future' and will signal a new level of purpose for the orchestra.

From 2019/20 – 2021/22 we will put together three seasons which establish RNS's identity with greater clarity around artistic quality, a chamber orchestra for the north, international recognition, artistic innovation and broadening audiences. Our goal is to develop RNS into an international quality chamber orchestra, which plays a distinctive part in the UK's orchestral scene and which can serve the north and fly the flag for the north with artistic excellence and innovation.

with a series of Artistic Associates, such as [REDACTED] Section 43 (2), undertaking two cross-genre collaboration boration with Amber Film & Photography Collective, repeat each concert in Sage Gateshead and at least once within the north, develop distinctive learning and community engagement activity, and perform as smaller chamber groups through the region to serve locations and audiences without concert halls.

We will deliver 170 performances in Sage Gateshead, 92 in the region, 52 internationally, work with 210 visiting artists and undertake 8 projects which involve digital development or R & D.

1.3.3 Folkworks

Folkworks stands for dedication to performance, participation and engagement with traditional and contemporary folk artist practice inside and outside Sage Gateshead. Our partners are EFDSS, Magnetic North East; Queens Hall Hexham, Beamish, Hartlepool Folk Festival, BBC Radio 2. Through this period we will focus on three areas of activity.

LIVE is our concert programme at Sage Gateshead and around the region supporting artists and promoters, particularly bringing the highest quality international artists to the North East, inspiring the next generation of performers, including Folkestra and through Hexham Gathering (youth folk festival), reflecting diversity and touring. We will commission at least one new work and premiere 2-3 new works annually. LEARN covers all aspect of our folk arts learning and participation programme. It is partly reflected in our Young People's Programme, ensuring that folk arts practice is at the heart of this. DIGITAL is our online community and includes a substantial regional archive. We will stream live activity to reach audiences who cannot attend events, use digital media as a way of increasing dialogue between audience and participant groups and undertake a major development project, in collaboration with

Beamish, Newcastle University and GMBC, to position the archive as a major folk resource.

1.3.4 Artist Development

During this period, we will establish artist development as an even more prominent part of our programme, building a set of formal programmes and our activity within our four specialist genres: classical, folk, jazz and contemporary music.

We will support professional artists and offer training & development for young people who show talent [this second element is described in our Goal 5 answer]. Our focuses will be on championing and celebrating local talent and the north as a great place to be an artist; exercising our international role; ensuring inclusion, access and diversity are at the heart of our artist development activity. Our partners in Artist Development are Serious, PRS for Music Foundation, Generator, ECHO, YCAT, Samling, NGA, BBC, Unlimited, NGCV.

We will run a series of Artist Development programmes through the year and across genres:

- Summer Studio – we will increase our offer to local and international artists to use our Music Education Centre during the summer holidays free of charge for research & development, network and collaborate, showcase their work.
- Composer residencies & Associate Artists – run at least four composer residencies with each of our regional youth ensembles and appoint six Associate Artists who will benefit from a year of mentoring, technical support and use of our facilities.
- Artist weekends - hold two artist weekends in Sage Gateshead each year, inviting artists from across art-forms to meet, discuss practices, ideas and concerns.
- Talent Development Venues – working with PRSF, we are lead on talent development in venues on behalf of their network of Talent Development Partners and have been invited to join their Navigator programme if successful in their application to ACE's SSO funding strand.

We will also continue our festival dedicated to emerging artists: New Year New Artists, developing it as a major platform for young talent from the north and internationally. All of our other festivals will feature emerging artist platforms and opportunities for artists to meet others (beyond the happenstance of festivals) at different stages in their careers.

Within our four specialist genre we will maintain a continued commitment to programming artists more than once and supporting their development with audiences. We will also have artist development focuses, selected examples are:

Classical - include cross-genre collaborations with the orchestra, training for RNS musicians, appointing an assistant conductor for Young Sinfonia, a pianist in residence and a chamber music curator.

Folk – annual master-class series, regular commissions for emerging artists, continued support of Folk BMus at Newcastle University.

Jazz – Joined Up project with Serious, to support emerging talent in the north within a UK network; continued delivery of BMUS in Jazz, Pop, Contemporary Music with Sunderland University.

Contemporary – monthly ‘spotlight on’ series, showcasing emerging talent

1.3.5 International

We recognise that one of our key roles in the region is to ensure that audiences can hear artists from outside the UK and that the region is represented internationally, particularly by our orchestra.

In the period RNS will increase its international activity, touring to South America, Asia, Europe. In the period we expect to deliver c. 50 performances internationally. With those outside of Europe we will work with NECC and British Council on building the wider impact of these visits with trade delegations and cultural exchanges.

In our year-round programming 25% of our own promotions in our building will be of artists from outside of the UK such as SW Symphony Orchestra Stuttgart, Royal Stockholm Philharmonic. We have a genre specialism in Americana programming and also regularly present artists from South Asia, Africa and all over Europe. All of our festivals have an international dimension, ensuring that international artists sit alongside emerging and local artists – SummerTyne, Gateshead International Jazz Festival, New Year New Artists.

We will participate actively in international networks – European Jazz Network, ECHO and ISPA, bringing material back to partners and the region. We will also continue to represent an international perspective from outside of London through our collaboration with British Council, Creative Industries Federation, Case for Culture/North East Culture Partnership.

1.3.6 Digital content and distribution

Cultural experiences are no longer predominantly ‘live’ – they both exist digitally in their own right and as live experiences channelled through digital platforms. This opens up huge opportunities to artists and audiences and has fantastic implications for music across genres. Our digital strategy for Sage Gateshead for 2016 – 2022 has five priorities:

- o CREATIVITY– expanding the scope and impact of our creative work leading with content creation, in venue, across the North and online (including artist development and creative learning content)
- o AUDIENCES – using digital to understand our audiences better, build deeper engagement with existing audiences and respond to the interests of new audiences.
- o CULTURE – developing an organisational mind set where digital is an integral part of our thinking.
- o ALLIANCES – holding conversations between our work, the arts, digital, technology and academic sectors in order to generate new ideas.
- o RESOURCES – investing in staff training and digital infrastructure, which allows us to operate in more efficient and flexible ways.

Building on our recent streaming pilots with Kate Rusby at Christmas and Kathryn Tickell, we will develop our streamed offer to take in a range of content through the year from both Sage 1 and Sage 2. We will also continue to work with BBC and Classic FM on broadcasts of one-off concerts and of full festival programmes.

We will develop Beyond the Concert Hall, a digital music experience for regional audiences no longer able to attend in person (targeting older audiences in

particular) and a Digital Guide to the Chamber Orchestra – an ongoing series of videos and interactive digital resources exploring the world of the chamber orchestra – beginning during the RNS 60th anniversary season. With Folkworks we will undertake a major development of the Folk Archive North East so that it is an online resource which can be accessed by anyone.

We will develop our role around artist development with an ambition for Sage Gateshead to be the national home for digital and tech crossover with music, offering a hands-on practical hub environment, regular digital and musician residencies and frequent commissions. Sage Gateshead is where the cultural sector meets the digital and tech sectors in the North, through dynamic networking, commissions, gatherings and sharing practice.

Launching during Great Exhibition of the North, we will set up an annual Sage Gateshead 'digimusic' commission which can be watched wherever you are in the world, bringing together digital creativity, technology and music in innovative and powerful ways. We will also develop Play Sage Gateshead in Hall Four, changing the experience for visitors online and to the physical space.

1.4 Artistic outcomes & measures of success

Our goal through excellence is to increase levels of cultural engagement, to build the reputation of the North for its creative activity and to support artists to make the best work which they can in the best facilities. Principle outcomes are: new work is created, new practice is developed, artists work on different scales (in our venue), audiences hear something new and are engaged, challenged, delighted.

We measure our success in a number of ways:

1. We use a critical evaluation framework for our main projects within a year. Starting with an evidence base and KPIs for the project, we then collect evidence (data and feedback) from audiences, artists, producers/partners, ourselves. This is used to plan and reflect on our future plans.
2. Our work is reviewed by specialist critics, especially commissions and festivals.
3. We recognise that in our local context we get less critical feedback than an organisation based in London or the SE. As a result we actively invite peers and stakeholders to see our work and invite feedback from them.
4. We seek audience feedback via surveys sent out to attenders of events and review comments made by social media and other channels from audience members.
5. We participated in the Quality Metrics pilot.
6. We monitor sales levels and track pace of sales daily.
7. Levels of funding that we achieve through numerous national and regional funders and our audience members
8. Feedback from the dissemination of our learning through regional, national and international networks.

Tell us how you plan to use our funding to contribute to the Creative Case for Diversity. No more than 10,000 characters.

C1 Our approach to Creative Diversity

Creative diversity has a vital role to play in delivering our vision and it played a vital part in our thinking as we defined this vision for our second decade. We recognise that there is intrinsic creative value in greater diversity of ideas, artists and approaches in music. Inclusivity of outlook and practice will lead to better and richer music and ideas which better reflect our culture and the world we live in. Therefore diversity in our curators, producers, musicians and music will be an essential part of what makes our programme of work both excellent and inclusive and indeed how we programme and produce.

By Creative Diversity we mean the range of artists, artistic material and artistic ideas which we are engaged with and presenting and we mean a connection to ACE Creative Case for Diversity. This answer focuses deliberately on these matters rather than diversity in our creative learning practice, which is dealt with in our Goal 5 answer.

Our Creative Case for Diversity objectives for 18-22 are:

- o Develop a wider programme with a wider pool of creative talent and through this have a better offer for our audiences
- o Deliver our mission of excellence and inclusion
- o Evolve our programming and producing so that a more diverse range of curators, producers and artists are making artistic decisions for Sage Gateshead

C2 Activity in 15-18

We have significantly developed our activity in this period and we have reviewed our approach resulting in adjustments to our ways of working.

Examples 15-18:

- 20% of our annual concert programme featured BAMER artists with SummerTyne Americana Festival showing a particularly diverse line-up including artists: Naomi Shelton & The Gospel Queens, Cedric Burnside, The McCracy Sisters, Lucky Peterson, Yola Carter and Amythyst Kia.
- The Classical Season featured two female conductors and GIJF 2016 featured 50% female artists.
- We partnered with Music and the Deaf to present deaf artists at Sage Gateshead and share knowledge.
- We co-produced a learning and performance project with Brazilian artist Billy Saga in partnership with British Council and SBC giving young people from our Arches (Musical Inclusion) programme the chance to create music with an international artist and creating an equal platform for them as artists.
- Supported Sarah Fisher, who has Cerebral Palsy and Mixed Hyperkinetic Movement Disorder, to progress from our BA Community Music degree to a Project Leader for our Music Sparks programme, which trains and supports young adults with learning disabilities to be music leaders, to a making artist supported by mentoring and performance opportunities made possible by a grant from Unlimited.

In 2016 we reviewed our approach to Creative Diversity involving board, team, RNS, Music Leaders, partners and participants. We undertook a Creative Case North Bursary and worked with three critical friends Ruth Gould, Jo Verrant, Nazli Tabatabai-Khatambakhsh to review current practice and discuss future plans which has informed our 18-22 objectives.

This led to the creation of a Creative Case and Equality & Diversity Campaign Group, which oversees an internal programme of development around equality and diversity training, and review. This is directly linked to our business plan and a member of our board has been appointed to the group.

Our recent board recruitment has brought changes to the diversity profile of our board around age, sexuality, disability and ethnicity whilst maintaining gender balance. Our new governance arrangements bring creative diversity into regular reporting and as a key focus for our Programme and Development Committee.

We have also established the following principles for our approach:

- o We set annual targets which are tailored to areas of activity, rather than a one-size fits all approach, that take into account numbers and impact. Targets are set by teams asking themselves how we can improve and become leaders in Creative Diversity.
- o A commitment to at least one high profile project a year around Creative Diversity, alongside a year-round approach, to provide a real organisation-wide focus and the potential for media attention and advocacy.
- o We have built Creative Diversity into our critical evaluation framework and our programming policy for festivals and art-forms, to ensure that it is considered across our whole programme and that it is part of all Producers' accountability and action.
- o Our Data and Business Support team have set up baselines for Creative Diversity, so that the Campaign Group can monitor progress we are making in our programming, celebrate when we see change and share with others.

C3. Our plans for 18-22

We recognise the value of partnership in helping Sage Gateshead affect change with greater speed and impact. As such we will actively seek partners to achieve our Creative Diversity objectives for 18-22. By the end of this four year period we aim to have embedded Creative Diversity into our programming, producing and artist development practice and to have influenced wider sectoral activity and thinking.

C3.1 Venue programming – festivals

We aim to produce one headline project per year during 18-22 which showcase diverse artists. The project will be artist led, involve CYP, allow for discussion and have a champion around whom we can attract media coverage. Provisional themes include hearing, mental health, physical disability and learning disability. All of our festivals, including the Great Exhibition of the North, will feature Creative Diversity at its heart. We aim to feature 18% BAMER artists and 2% disabled artists across our all programming and commit to working within our networks to advocate and better understand how to diversify our programmes. Partners include: Serious, Americana Music Association (UK and US), MBM, GemArts, Jazz North East, Making Tracks; Asian Arts Agency.

C3.2 Royal Northern Sinfonia

We will work on three creative collaborations within this period:

A multi-year collaboration with Candoco Dance and RNS putting able and disabled dancers and musicians together to develop new work for performance around which we will build a programme of player development and young artist development in music and dance.

The Listening weekend - an exploration of hearing, built around the Season finale, Beethoven's Fifth Symphony, composed when he was almost completely deaf. We will use this context to showcase deaf artists, how young people have explored themes of hearing, and a public engagement programme around how we listen.

Britten Cabaret –deepening our collaboration with Streetwise Opera, we will create a new piece of music for homeless and ex-homeless artists alongside professional artists. The piece will explore themes around politics in music and include a programme of engagement around migration and refugees in partnership with TWAM.

In addition we commit to profiling female conductors each season, commissioning composers with protected characteristics, use a set of questions when booking soloists which prompt creative diversity in selection, undertake a programme of player training around diversity, advocate within the orchestral network in the UK, advocate with our classical music network in the North East.

C3.3 Folkworks

We will explore diversity within folk arts practice and examine the role of the folk arts in creating cultural unity in an increasingly diverse society. We will lead debate around this topic and commission new work connected to this theme working with Newcastle University, Beamish, GEMArts, EFDSS and Hartlepool Folk Festival and EFEX.

We also commit to ensure that artists leading all aspects of our folk programme – schools projects to Summer School and Folkworks classes will include range in age, ethnicity and physical and learning disability.

C3.4 Artist Development

We have set the following goals for our artist development programme: 50% of our Associate Artists and Composers in Residence will have protected characteristics; 25% of our Summer Studio participants will have protected characteristics. Within our Artist Open Weekends we will have creative diversity as a central agenda item and invite provocations from diverse artists. We will work in partnerships with Baltic, European Concert Halls Organisation, Generator, Young Concert Artist Trust, BBC New Generation Artists, BBC Introducing.

C4 Ways of working

C4.1 Recruitment/selection and curation

We will introduce a number of measures including diversity questions for programming teams, developed in consultation with artists; blind auditioning; open calls for commissions, creative collaborations and artist development opportunities; and regular evaluations to ensure transparency. We will draw upon existing networks initially and then establish an artist advisory network.

C4.2 Monitoring and advocating

We will monitor the profile of performing artists, those involved in artist development and those commissioned using our Critical Evaluation Framework. We recognise that each of these areas has unique challenges and that it is important that all make progress towards greater diversity rather than one area delivering on behalf of others.

We will share our profile annually with NGCV, looking collectively at the change we can make through a critical mass of activity.

We have set goals around use of images within our printed and on-line promotional material, our PR brief ensures that Creative Diversity in our work is profiled and represented in our Annual Review.

We will advocate particularly around our genre specialisms where we consider that we have a particular role to play and particular areas (classical – physical ability and hearing; Jazz – female artists; folk – ethnic diversity; musical inclusion – artist development). We will advocate through our regional, national and international networks.

Goal 2

**Tell us how you plan to use our funding to contribute towards Goal two.
No more than 20,000 characters.**

Everyone has the opportunity to experience and to be inspired by the arts, museums and libraries.

2. Introduction

Sage Gateshead's starting point with 'everyone' is particular, as a result of our location. Our population is modest in total number and is spread over a wide geography and has a high proportion of people who are least likely to engage culturally.

2.1 Your support

We will use your funding to increase cultural engagement in the North and to contribute to levels of musical opportunity nationally by making significant developments to our programmes, with increased activity beyond our building and in digital content and distribution. We will also develop our marketing and communications.

Our audience development aims for the period are to attract the least engaged; increase the range of people engaged in music, reach more people within our current audience profile and increase the depth and quality of experience for those already engaged, aiming for these outcomes:

- People following progression routes through our programmes - for example from audience member to participant or vice versa or through different participation levels or through different frequency levels as an audience member.
- More people learning music, greater depth in people's experience of music events and social impacts
- An increased engagement with local communities and a role for the arts in our civic life
- Higher levels of ticket sales, secondary spend, membership and donations

2.1.1 Our local context

We know the following about the audience within a 2 hour drive of our base:
Population The population is 2.6 million ranging in density from 62 per sq km in Northumberland to 2,643 in Middlesbrough. There is a wide range of quality of life within the region – from the highest in the UK to the lowest.

Disability Almost 15% of adults aged 16 to 64 had disabilities that limited their daily activities or work (the highest in England).

Employment & Finance More than 1:5 children (22.4%) live in workless households. 7.9% of adults of working age in the NE are not in employment. Gross disposable income of residents in the NE is 15% below the UK average. The NE had 18% of children living in poverty before housing costs are taken into account and 32% of households in the North East are in the DE social grade (25% nationally).

Family The NE has the highest proportion of one person households (30% in 2010) and lone parent households with children (7.7%) in UK.

Health & Life expectancy Life expectancy at birth was amongst the lowest in the UK (m=77.2y; f=81.2). In 2011 the North East had the lowest proportion of people rating their health as 'Very good' or 'Good' (77 per cent).

Age The median age of the region was 41, 2 years higher than the England and Wales average.

Education The number of people with an NVQ4 or above is 6% lower than the

national average. The North East had the highest proportion of people aged 16 and above showing an apprenticeship as their highest level of qualification (5 per cent).

Nationality & ethnicity In 2011 there were 129,000 foreign-born residents in the North East, 5 per cent of the population. 95% of the regional population is white. 3% is Asian. 20% of primary children in Newcastle are BAMER, indicating a significant change coming up in the cities.

2.1.2 Our audience

In 2015/16 we had a total reach of 5 million through live, broadcast and digital content; footfall in our building of 500,000; 300,000 attendances for performances in our building; 50,000 ticket sales for concerts in the region; and 30,258 tickets sales for a course or a class.

For our 300,000 attendances, we have 60,000 active ticket bookers (an average of 5 tickets for each booker). 30% of our active bookers are under 40. 30% have NewcastleGateshead postcodes. 15% come from outside the region. 63% of our courses and classes bookers have a NewcastleGateshead postcode. 21.5% of our courses and classes bookers come from outside the region.

71% of our audience are from 4 Audience Finder segments, of which only one is in the top 3 segments: Dormitory dependables 25%; Comuterland culturebuffs 19%; Trips & Treats 17%; Home & Heritage 10%. A smaller proportion of our population is in the top 3 Audience Finder segments than in any other part of England – the region has a lower number of people who profile as 'highly likely' to engage and higher numbers of 'least likely'. Using Mozaic profiling Family Basics, Transient Renters, Municipal Challenge, Vintage Value and Modest Traditions are 50% of the NE population compared to 28% of the UK population.

In 2015 20% of bookers (9,210) were frequent attenders contributing 44% of spend. In 2015 80% of bookers (48,317) were infrequent attenders contributing 56% of spend. Frequent is 3+ times in a year. New audience figures in 2015/16 were 10,230. 15% of our bookers have a long-standing illness or disability.

In sum, over 12 years we have built high levels of frequency and loyalty amongst a less typical audience than our peers elsewhere and we have a wider audience profile than many peer organisations across the UK. Booker profiles are spread across culture segments rather than clustered in the top three which the arts sector can often super-serve. Furthermore, through recent Newcastle Gateshead Cultural Venues research, we know that we have only 20% overlap in bookers with all of the other NGCV venues. This is as a result of two principle factors: the very wide range of our programming across musical genres from mainstream to niche and the strength and volume of our work with the least engaged. And of course the still relatively low levels of cultural provision in this part of the North.

2.1.3 Demand for our work

We know that there is demand for our work because:

- We have 300,000 paid attendances, 200,000 free attendances per annum and 5 million people accessing our work online or via broadcast
- We have exceptionally high frequency levels for a 12 year old organisation
- We have 96% customer satisfaction via surveys

- Year-on-year attendances grew e.g. by 7% for classical, 13% for festivals
- We have a social media reach of 800k people, including 27k facebook and 45k twitter followers.

2.1.4 Development in the current NPO period

We have made progress in the following areas:

- o Diversifying our offer to broaden our classical programming within Sage Gateshead, including bringing back visiting orchestra, the introduction of concerts for under 10s and increasing RNS concerts beyond the Sage Gateshead building and starting free pop-up performances in Newcastle, Gateshead and Sunderland
- o Building inclusion, entry points and pathways. We have increased visitors to the building through more free and public programming with a diverse range of partners, grown our festival attendances through free stages, media partners and more focused marketing and new ticketing initiatives, such as free tickets to Gateshead residents. We have also developed new community engagement programmes, such as Sharing the Stage, making work with communities in West Newcastle.
- o We have developed our data capture and use, putting data at the heart of our planning and operations. We have established weekly commercial sales information and matrix approach to planning programme and marketing; undertaken a Gateshead and Newcastle profiling project with Public Health teams to establish areas of high inequality and low engagement and to plan accordingly; completed The Unusual Suspects project and hosting the next phase of the project which actively uses the 9 venue data and undertaken an internal review of our use of Tessitura.

2.2 Plans for 18-22

We will continue to develop our top 4 segments and develop Experience Seekers, Up our Street and Facebook families. We plan to reach a total audience of 2.2 million in our building, 400,000 beyond the building, sell 1.6million tickets and reach a digital/broadcast audience of 8 million. Within our audience we are aiming to reach 25,000 people who are least engaged or living in challenging circumstances.

2.2.1 Programme development

Our Public and Community Engagement puts a new emphasis on our relationship with potential and existing audiences. Half of this programme takes place in our building and half of it takes place in communities through the North. It has 4 areas: encouraging depth of engagement in the artistic content we produce, encouraging a wider range of people into our building through our concourse programme, making connections with communities through the north east and participating in region wide or change programmes, such as the Well North pathfinder.

2.2.2 Public Programme - within our building

Our Music Education Centre and our large concourse space mean we can be a music development centre, not just a concert hall. These spaces are vital for our audience development and our widening participation activity.

We will deliver public courses, classes & workshops offering people the chance to learn music in a fantastic set of facilities. This includes early years, family, adult and silvers classes. In particular our programme for over 50s is unique in the UK with its emphasis on progression and peer support. We will make two significant developments in this area: digital learning (and partnerships around

this) and connecting the content of this with the wide range of visiting artists coming in to the building.

We will build our Public Engagement in and around our building and online – family activity, weekend fairs, insight events, hacks – encouraging deeper engagement around our artistic content and everyday creativity and encouraging footfall, by participating in activity which is not initially music led.

2.2.3 Community Programme – beyond our building

This is a new area of activity, working from local activity tapping in to community organising and supporting increased local capacity.

Firstly, in NewcastleGateshead we will offer our orchestra, folk musicians and Music Leaders as creative resources to communities. We have recently run two pilots – one in Gateshead around Chopwell Community Centre and one in West Newcastle around our In Harmony school. The latter, Sharing the Stage, brought together 10 diverse community groups with RNS and Unfolding Theatre to create a new piece telling the story of West Newcastle.

Secondly, we are developing a series of regional relationships in which we will work with partners who are seeking to build cultural engagement and infrastructure and we will offer training, support and programming in these areas (Sunderland, Durham, Kendal, Middlesbrough, Darlington, Berwick).

2.3 Other developments

Our programme and audience development plans are supported by these further developments:

Our building development plans also lead on our ambition to develop audiences: increasing accessibility, broadening programming possibilities in Sage 1 by making the seats flexible, installing digital signage in and on the exterior of the building to improve marketing and communications about what is happening in the building.

We plan to develop a refreshed marketing and communications strategy by September 2017, following the arrival of our first Director of Marketing & Communications in March 2017. By 2018 we aim to have: a new website; print at home tickets; MySage giving personalised customer information; digital signage.

We are developing our region-wide distribution, particularly through RNS and Folkworks touring, ensuring that work reaches a wider region-wide audience in locations where there are no concert hall facilities. Furthermore, RNS's international touring is increasing – in 2016, RNS toured internationally for the first time in 6 years and in 2017 has plans to travel to China, Japan, 5 countries in South America and 4 in Europe.

Through broadcast relationships with BBC 2, 3, 6 Music and Classic FM, the music we programme, and produce continues to be heard nationally. In 2017, we will release a first disc recorded by Lars Vogt and RNS. Following a series of successful streams of concerts by Kate Rusby and Kathryn Tickell from Sage 1, both as paid and free access, we will stream on a regular basis.

Along with nine NGCV organisations, we are part of a regional data sharing and marketing initiative 'The Insider' which creates new opportunities for more people to be inspired by the arts. By joining a free, single, shared, opt-in

database, members receive targeted communications and experiences to persuade them to engage with culture, try new artforms and visit new venues. It's underpinned by Morris Hargreave McIntyre's audience segmentation model 'Culture Segments'.

2.4 Audience development plans 18-22

This is a sample of our planned activity across our audience development goals and through Programme, Place, Price and Promotion.

2.4.1 Attract the least engaged

Who: Young people in challenging circumstances, the lowest socio-economic groups, refugees

Programme: Our musical inclusion programme will deliver to 2,600 people who are least engaged and we will train 500 trainers, to maximise the impact of our expertise. We will programme artists and shows with a mainstream appeal to encourage people to come to Sage Gateshead for the first time and artists such as Billy Saga who can appeal to young people in challenging circumstances.

Place: We will continue to train our teams so that they are working with the latest standards in welcome and access. We are Dementia Friendly, have Max Card, signed up to the Autism Charter and are part of Safe Places. Our Community Engagement Programme will take small-scale folk, classical and contemporary events to local communities in Gateshead and Newcastle and we will work with regional partners to develop cultural engagement with their local communities.

Price: Free tickets for Gateshead residents for our own promotions targeting for first time attenders.

Promotion: Open days – come and meet us events for people who can make connections within communities and encourage people to try an event.

2.4.2 Increase the range of people engaged in music

Who: Young adults, the lowest socio-economic groups

Programme: Increased concourse programme in partnership with arts, community and private partners, targeting new audience profiles and increasing reasons for people to come to Sage Gateshead to hear music or participate in an activity. Development of our festival programming, for example building our New Year New Artists programme, towards new audience segments and using our Christmas and Summer programmes to create first time audience opportunities. Through our approach to Creative Diversity we will programme a wider range of artists.

Place: Our capital developments in our Sage Gateshead building will enable us to programme new kinds of music event for different audience profiles. Our partnerships with regional venues and producers will develop cultural engagement across the region.

Price: We will maintain a wide range of prices; our first-timers pricing and companion pricing.

Promotion: We will develop bespoke campaigns to reach these groups recognising the different channels and approaches we will need to take.

2.4.3 Reach more people within our current audience profile

Who: We will particularly focus on families & young people, those with specific needs and first time adult attenders.

Programme: A Try Out weekend – an opportunity for people to come to Sage Gateshead for the first time to sample our work. Our festivals programmes will continue to include entry points for first timers as well as those with experience; we will continue to increase our family programme.

Place: RNS touring has been reaching 75% new audiences through 2016. As this touring through the region and a consistent programme of work develops we will continue to reach new audiences. Increasing our paid and free streaming, so that there is a frequent offer and we will build our digital content which enables audiences to sample Sage Gateshead artists.

Price: Promotion of our first-time ticket offer for Gateshead residents and develop similar offers for first timers across the region.

Promotion: We will focus on three things to develop our reach and increase awareness amongst our existing audience segments: building existing and new media partnerships with BBC 6 and Radio 2/Capital/Classic FM and targeting particularly through NARC and Living North for example; increasing further our digital marketing in order to be able to target segments differently and increasing our physical advertising. We will continue to participate in Family Explorers, a region-wide network for families seeking cultural activity, set up by NGCV.

2.4.1 Increase the depth and quality of experience for those already engaged
Who: Families & young people, adults, older people, those with access and particular needs

Programme: With a new Public Engagement Programme, our insight events and workshop series will increase, as will classes and master-classes with visiting artists for the 2000 people who attend a class with us each week. We will film this activity for on-line content and our concourse programme will include debate and discussion series and we will use our white walls to host visiting exhibitions.

We will develop our pathways to progression particularly for young people to encourage audience members to become participants and vice versa. We will continue to develop the range of visiting ensembles in our classical programme to include early, choral and piano series; we will increase the range of contemporary folk artists programmed and develop our online activity through our Folk project Pass It On.

Place: RNS will tour through the region, establishing a Winter and a Summer tour to locations without concert venues; increased concourse programming pre-concert and during festivals and increased flexibility in the Sage 1 seats will support a richer experience.

Price: Maintaining competitive pricing with added value – chances to meet artists for example – and a range of price points for audiences; developing Sage Supporters, our membership scheme, to include greater benefits around pricing, and crucially increasing the sense of community within Sage Supporters.

Promotion: Promote MySage brand and support it with welcome information to each booker with added value material, suggestions of courses to try to ticket buyers and vice versa. Continued development of The Unusual Suspects,

using Culture Segments to encourage existing audiences to try new activities and try out other cultural organisations' activity. Increasing numbers of RNS Friends and Sage Supporters by holding taster events and promoting these regularly to audience members.

2.5 Data collection & joint working

We have made significant strides with our use of data in the current NPO period. Our ability to achieve our priorities to reach a wider audience and to sustain our artistic and commercial activities will require continued evolution and improvement. We have set up a data and business support team, which includes IT, data and event set-ups, as a central resource for the organisation. By the end of 2017 we will have a data strategy and have completed a major piece of work on developing our use of Tessitura across the organisation.

We collect data from ticket bookers in our building and our events across the region, users of our building (via wifi registration) and on-line audiences. We use this data to inform our programming and marketing decisions and use segmentation to tailor our communications and to encourage audiences towards events we are confident they will enjoy and to introduce them to new activity which they may want to try.

We operate data sharing agreements with hire and co-promoters coming to Sage Gateshead. We participated in the Quality Metrics Pilot and as this is rolled out we will look at ways to integrate this material with our data collection. We continue to be an active part of the Tessitura network, having been the second user in the UK, and at present we are particularly in dialogue with Tessitura on fundraising functions and the integration of event planning software with the system. Our Tessitura system hosts NGCV's Unusual Suspects project as we contribute almost half of the data in this project.

Goal 3

**Tell us how you plan to use our funding to contribute towards Goal three.
No more than 20,000 characters.**

The arts, museums and libraries are resilient and environmentally sustainable.

3. Introduction

Music and learning have the capacity to provide moving experiences, support personal growth, bring people together and to deliver outcomes which support health, education and social cohesion. At scale, cultural organisations can be part of a regional and national conversation, participate actively in regeneration and help define identity. It is with all of this in view that Sage Gateshead was created and 12 years on this capacity seems more vital than ever. We have a role to play in addressing challenges positively and this has informed the creation of our new vision and mission and programmes of work in 2016. Although this question is about ours and sector resilience, our mission is social resilience.

3.1 Your funding

We will use your funding to support strong governance and strategic planning, uphold the quality of financial management which we have put in place in the past two years, maintain our building, develop our digital infrastructure and environmental considerations. Further, we will use it to support the wider sector in the North, by sharing practice, resources and information.

3.2 Our context

We operate in a small market (a catchment of 2.6 million people within 2 hours) where cultural provision and cultural engagement of the kind we are describing here has been modest. Disposable incomes for the top 10% of earners are higher than in other parts of the UK because the cost of living is relatively low, but for 50% disposable incomes are lower than elsewhere. Recourse to philanthropic giving or sponsorship is on a more modest scale than even other regional centres, given the lower levels of business and private wealth based in the area. We anticipate by 2020 that our local authorities will be in the weakest position in the country (the point at which they will have no central government funding) and the limited means they will have to lever new streams of income available to them either through policy change (eg business rates) or through entrepreneurial activity of their own. We know that need has gone up and requests for our participation in programmes of work using music to deliver social impact has gone up considerably in the past five years. All of this will take place at the same time as inflationary pressures are likely.

Further political, economic, social and technological factors are relevant. Firstly, Britain's decision to leave the EU is likely to bring a high level of political uncertainty in coming years. Our local devolution agenda continues to play a significant role in the area's political life and it is likely to add a layer of additional challenge for our region. This is an opportunity for the arts to engage in debate, reflection, social engagement in a time of significant change. Secondly, the economic uncertainty could impact upon our operating model, with pressure on international artists' fees, potential reluctance of donors and charitable foundations to commit affecting our fundraising levels and possible box office uncertainty if people cut back on non-essential spending. Thirdly, recent research, for example by the Warwick Commission, suggests that there are still significant segments of society which have low levels of engagement in the arts. Together with the impact of austerity and the way our civic structures (for example changes in education at all levels) have changed, we face some very significant social changes. Finally, technology is changing the way in which we live and within this the way in which we engage in music. We recognise that audiences and artists are engaging with music through and we have a role in this.

We recognise that we must be actively seeking to address this context both for ourselves and in a leadership role. Our response is supported by:

- o A new vision and mission
- o Increased emphasis on activity outside of our building and on community engagement
- o A digital strategy
- o Embedding creative diversity across the organisation in people, practice and programme
- o Evolving our Learning & Participation Programme so that it focuses on two areas – young people and engagement
- o Actively programming our concourse with a range of partners and first access activity
- o Maintaining a programme of capex and environmental development

3.3 Developments in 15-18

A key focus in 15-18 has been to improve the resilience of Sage Gateshead and very significant progress has been made through a major programme of organisation development. Arts Council England has played a vital and positive role in this, thank you for your support.

During 2015 and 2016 we have undertaken a series of Organisation Development projects:

- o Board-led governance review delivering major changes to arrangement and major board recruitment, significantly increasing diversity
 - o Brought in a new leadership team with a new structure with a Managing Director and Chief Operating Officer working in partnership.
 - o Service review – working with the North East Regional Employers Organisation, we reviewed our structure, reduced our operating overhead by £500,000, mapped our services and ways of working and have implemented changes to become more efficient operationally and in our planning.
 - o Programme review – detailed reviews of Learning & Participation and Royal Northern Sinfonia and work on a digital strategy and a creative diversity strategy (both of which are cross-organisation, but there was particular need to develop these areas in our programme).
 - o Capital review - creation of a three-tiered capital strategy for ongoing capital expenditure, major capital development and business development needs.
 - o Vision 2025 – we undertook a full consultation of stakeholders, audience, participants, staff and artists about our vision for our second decade. The outcome of this consultation is used at the top of this application in the section about purpose.
- We have also put in place a strategic planning cycle which is used by everyone (from board down) in the organisation to support annual corporate planning, performance review and risk assessment.

In fundraising, we have completed our Catalyst fundraising so that we now have £17 million in endowment, which generates £1million of unrestricted income each year.

3.4 Plans for 18-22

Our work in 15-18 provides us with a strong foundation for this forthcoming period. With the external environment as challenging as noted in 3.1, this will be crucial to ensure we can be adaptive and proactive in addressing challenges. The key factors which will underpin our resilience are: strong governance and

strategic planning, continued development of our income streams and sound financial management, capital development of our building, accelerated investment in digital activity, continued development of environmental activity, thorough Health & Safety, safeguarding and large scale emergency planning and management. [We are deliberately not citing people as a key factor here as we address it in our Goal 4 answer in full.

3.4.1 Governance

North Music Trust is a charity and a company limited by guarantee. It has a wholly owned subsidiary Music North Limited through which all commercial activity is channelled. NMT is chaired by Lord Falconer of Thoroton, with Vice Chair Margaret Fay giving the charity leadership based in the region and in the capital.

We anticipate that the key aspects of governance during this period will be:

- o Using risk assessment and networks to ensure that opportunities and challenges in our environment are being addressed
- o Oversight of the legal and ethical framework within which we offer – particularly around Health & Safety, Employment and Fundraising and Investment ethics.
- o Using monitoring and reporting to ensure that the organisation continues to deliver to plan and consolidating the benefits of OD
- o Supporting the team to develop the identified streams of income in order to grow revenues
- o Ensuring good leadership development takes place and, as appropriate, succession planning for the senior team
- o Establishing new advisory structures -setting up young people and artistic advisors groups and in 2019 we will search for a new Chair, as his second term completes in 2020.

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3.4.2 Strategic planning and risk

Having instigated a strategic planning framework, we will use this and our risk register to ensure that annual and long-range business planning is thorough and runs through the organisation. This is also a central part of our performance management framework, ensuring that everyone within the organisation can connect their goals with our overall goals.

3.4.3 Financial

Our emphasis will be on revenue growth in 18-22. We have the following goals – budgeting to achieve an unrestricted reserve of £1.2 million by the end of the period, continuing to develop our financial strength around our core mission and raising capital funds to deliver our capital plans.

Firstly, we will continue to budget an annual surplus per year which by 2022 would enable us to achieve our target reserve. With inflationary pressures and risks associated with income streams, this is not an easily achievable goal, but we are committed to it as a key component in our resilience.

Secondly, our core business has scope to develop across a number of areas – ticket income and related ancillary income, fundraised income and service income. Unlike peers who may be at the limit of their auditoriums' capacity, as a young organisation, we still have scope to grow our occupancy. Whilst maintaining a focus on innovative programming and developing our audiences we will seek to build our box office income. Furthermore, now that our catering is in-house and with a new approach to retail, we will increase our secondary spend around our ticket sales. This will involve a combination of reviewing where and how we ticket, continued evolution of our pricing and charging strategy and developing our programming to continue to widen and increase our offer. Aligned with this, we deliver a number of support services – building services, technical, catering - which we are commissioned to deliver for others. We will continue to develop this.

We will evolve our fundraising through a bespoke approach to raising for Royal Northern Sinfonia, Folkworks, Artist Development, Young People's Programmes, festivals and our building. Whilst the approach of keeping fundraising focused on Sage Gateshead as a whole has worked to establish the identity of a single organisation, recent research has suggested that a more segmented approach should reap greater levels of income. For example we benchmarked RNS's fundraised income against the Scottish Chamber Orchestra – they are raising almost 8 times as much as we raise against a similar level and kind of activity.

3.4.4 Capital plans

We have a new capital strategy which aims to ensure that our building is sustainable financially and environmentally; safe and compliant with legislation; of an appropriate quality and with appropriate facilities to serve our audiences and future needs; respectful of its design and local context.

The strategy includes ongoing capital works in the building [CAPEX], annual investment requirements [business development] and one-off capital projects identified for this period [capital development]. The first two are part of annual operational costs, whilst capital development will be subject to specific fundraising.

We are currently fundraising for the most urgent element of our capital development needs. There are three parts to the business case – increasing our capacity to develop audiences, increasing our financial resilience, keeping us up to date with access and environmental sustainability.

The project is to redevelop the Sage 1 seating and create storage for the seats in two of the Arches behind our building. This would enable the stalls seating to come out of Sage 1 easily which would significantly change our programming possibilities enabling us to attract different artists and different audiences. Aligned with this, we will develop our concourse communications through digital signage on the interior and exterior of the building and improved audio for FOH and music across the building and updating of hearing equipment to ensure we are as accessible as possible.

This is costed at £2 million and is included in our budgets for the period, including the impact upon our business, which is that it will enable us to generate a further £400,000 in earned income pa, helping us maintain financial resilience by meeting inflationary pressure. Without this project we know that we

will struggle to maintain resilience. We currently have a request for £1.2million from your large scale capital scheme.

We have identified further areas for capital development, but have phased the whole, to ensure manageable fundraising and business continuity. We will review the scheduling of the other two phases in the second half of 2017. We do not anticipate requesting support from ACE for these second and third phases.

3.4.5 Digital development

Our digital strategy acknowledges the role of digital in building our resilience. By 2018, we expect to have a new website which is completely mobile and can deliver personalised user experiences, full integration of Exchequer, Tessitura and Artifax, a new data analytics strategy, ticketing developments such as Print at Home and, capital plans permitting, our building should have digital signage inside and outside.

In the same way that we have integrated Capex into our annual budgeting cycle, we have budgeted digital development so that we can each year continue to evolve and generate income against this area. We will work closely with partners to develop our own capacity in this area and to seek to support and influence the wider cultural sector in the north. In particular we will work with Generator to establish a set of digital partnerships which will encourage the cultural sector to engage with the local digital sector.

3.4.6 Environmental

We are extremely committed to environmental sustainability and we will continue to focus on three areas: the building, consumables and ways of working around our activity. Our leading project is Gateshead Council District Energy Scheme, which is owned and operated by Gateshead Council, is based on a gas fired Combined Heat and Power (CHP) energy centre located in Baltic Business Quarter. The scheme has reduced heating costs by more than 7% and electricity overheads by 4%, further reducing costs by limiting exposure to green/carbon taxes and levies. As well as energy savings, Sage Gateshead will benefit from reduced on-going heating plant maintenance, servicing and replacement costs. In 18-22 this scheme will be developed to include our hot water supply.

As we build the quality and reputation of our catering, having brought it in-house, we have a greater level of control over the sourcing, transportation and nature of the food and drink. We will build this as a central part of the business and the brand for our catering in coming years.

We will maintain our Green Team, working closely with our operations team, focusing on improving our carbon footprint in our programming and our orchestra; encouraging audiences to be as environmentally sustainable as possible through their customer journey; looking for continual improvement in our operations. The team also works collaboratively with Newcastle Gateshead Cultural Venues network to share knowledge and best practice and encourages staff to take part in small initiatives such as Lift Free Mondays. NGCV is delivering a network-wide audience survey to assess audience travel habits and inform how each venue can better publicise or improve sustainable travel options. We will work in partnership with Green Energy Consulting to produce an ESOS audit document which demonstrates good practice across the

operations of the building. Within our programme, we have mapped the carbon footprint of our festivals and shared this through Julie's Bicycle and international networks such as European Jazz Network, ECHO and BACH.

3.5 Safety

3.5.1 Large Scale Emergency planning

We have an iconic building and work closely with the Northumbrian Police Force to ensure that our security arrangements are appropriate to current threat levels. We are the local area's invacuation site and therefore ensure that arrangements for the need for this are appropriate. We meet quarterly with the Counter Terrorism Security Advisor for the area. We carry out GRIFFIN training for sage Gateshead staff with qualified trainers from Northumbria Police and will be undergoing an Operation ARGUS exercise in 2017 along with colleagues from local authority and emergency services to allow us to table top emergency scenarios.

Major IT or technical failure and the potential risk to data is one of our most significant risks and we have recently upgraded and improved our onsite disaster recovery systems. 100% of critical data now has 2 separate backups methods with 90% of critical data having 3 separate backup methods.

The building has several 'back-up' services functions. An onsite generator is there to support emergency lighting and the main computer room power supply for a prolonged period if necessary. Emergency lighting within the building has either internal battery support or and invertor supplying multiple fittings in a space/room. The building hot water supply has additional boilers in situ capable of ensuring maintained level of service to the building in the event of external supply failure.

A large scale emergency plan and associated communications plan are held and reviewed annually.

3.5.2 Health & Safety and safeguarding

We will maintain excellence in Health & Safety within our building and with our work beyond the building. It is overseen by a board sub-committee with quarterly reports and a regular review to ensure that we are compliant with latest legislation and best practice. Safeguarding for our staff, our audiences, our artists will also be of the highest priority, also reporting quarterly to the board.

3.6 Wider sectoral resilience

We recognise our role in supporting the wider sector and we will do so in the following ways in the coming four years. Firstly through our regional relationships, we will support venues, programmers, producers as they build levels of cultural engagement in their local areas in Sunderland, Carlisle, Darlington, Middlesbrough, Berwick, Durham. For example, supporting Middlesbrough Town Hall as it reopens post-refurbishment, by sharing our Quality Framework as they build a creative learning project. Secondly, together with Baltic and Tyne & Wear Archives and Museums, we are running Gateshead Cultural Forum which pulls together arts organisation and artists in Gateshead, sharing knowledge, supporting with our resources and maximise capacity for ambitious collaborative working to creatively tackle local issues. Thirdly we offer advice on good practice and templates on ways of operating to

other organisations.

Goal 4

**Tell us how you plan to use our funding to contribute towards Goal four.
No more than 20,000 characters.**

The leadership and workforce in the arts, museums and libraries are diverse and appropriately skilled.

4. Introduction

People are our most important asset and Sage Gateshead is one of the biggest employers in Gateshead. We aim to create an exemplary environment for people to do their best and to act as a model within our area and within our sector. We know that in challenging times this will be more vital than ever.

4.1 Your support

We will use your funding to further develop our learning culture and diversify the profile of our team; a programme of training and skills development – of artists and creative apprentices; and supporting the wider cultural sector more proactively – with a particular focus on music and on the new venues which are developing within the region.

4.2 Current profile

4.2.1 Leadership

A new leadership team of 7 has been recruited during the current NPO period, including newcomers to the region, locals and people who have been promoted through the organisation. It combines experience from within the cultural sector and without and increased diversity in age, disability and sexuality.

4.2.2 Team

Our current team has a wide range of skills and knowledge:

- o 156 musicians including a full time orchestra of 37, tutors for our Centre for Advanced Training and Music Leaders who deliver projects as part of our Young People and Public & Community Engagement Programme.
- o 245 Front of House and Back of House including facilities, security, technical, catering, customer experience and ticket office staff
- o 81 staff with specialisms from finance to marketing to programming to social impact evaluation

This is a mix of full time and part time, permanent and fixed term contracts, a FTE of 198. A much higher proportion of administrative staff is full-time than musicians or Front of House and Back of House staff. A Customer Experience member might be a student who does a few hours a week around study or a retired professional who does a few hours a week around childcare duties as a grandparent.

From our 2016 staff survey we know that the staff see Sage Gateshead as an extraordinary place to work with a wide range of people, many with highly specialised skills, coming together to make a very high volume of high quality work year-round. This survey also contributed to our assessment of ongoing training and development needs and pointed to areas which we need to work actively on as volumes of activity increase and as new team structures are laid down – specifically avoiding overstretch and putting a strong emphasis on cross-team communication.

4.2.3 Volunteers

Volunteering currently has three aspects: involvement in our governance, supporting our RNS Friends scheme and running some of our programmes (for example, some of our Silver Programme members run other groups using skills they have developed through the programme). We currently have c. 100 volunteers. In this new business plan period we will scope the role of volunteers within our organisation, looking to increase the involvement of volunteers in Sage Gateshead, using the Great Exhibition of the North as a springboard,

working in partnership with Baltic and Gateshead Council.

4.2.4 Activity in the current NPO period

During our current business plan, we have been very focused on workforce development as a crucial element of organisational development. Some key benchmarks we have established during this period are:

- o Excellent practice in governance and board recruitment
- o Excellent practice in staff recruitment, selection and induction, with baselines across the whole organisation
- o A Creative Case and Equality & Diversity Campaign Group which takes in HR as part of its remit
- o An organisation wide Learning & Training Strategy
- o Peer learning approaches and use of digital technology to train

We assess training needs through a combination of routes: the PDR process, an overall Organisation Development plan, Critical Reflection Framework and staff survey.

We combine on job training with a programme away from the job. Everyone in the team has the same first training and there are bespoke training programmes for the administrative team, the orchestra, Music leaders and tutors, the Customer Experience team, the Catering, the Technical and Operations teams. Our central training starts with Vision & Mission, policy, software training, health & safety and safeguarding, project management and partnership. Beyond this there are 4 day training programmes for our Customer Experience Team and Technical teams each year.

We hold a staff away day for the whole team, conduct a staff survey each year and have a group called 3Cs which is our staff forum with 10 members and 1 board representative who meet monthly and feed through to our Executive team and board on staff matters.

We have policies and guidelines around recruitment and selection, which have recently been reviewed and revised following our Service Review. Our Equality & Diversity Action Plan includes targets around reaching a more diverse range of candidates for employment.

All of this activity will be overseen by our new People sub-committee of the board.

4.2.5 Recent assessment of need

Our Service Review which looked at financial stability and effective use of our systems and ways of working has generated a good deal of practice that will underpin development of learning, training and diversity. Our assessment of current strengths is as follows:

- o Quality of our training for operational teams
- o Our ability to accommodate diversity in terms of age, learning ability, flexible working requirements within our team
- o Strong centralised recruitment and selection practice

Our assessment of need is as follows:

- o Up-skilling our administrative team in management and leadership
- o Building training into our orchestral schedule to equip players with skills to lead learning and community engagement activity
- o Training administrative and Ticket Office team to a higher level in software

capability to support marketing, fundraising, customer experience and audience development

- o A continued cross-organisation training for particular needs – autism, dementia awareness, physical access training for example.

- o Awareness raising around digital activity across the organisation and assessment of any training needs

4.3 Plans for 18-22

4.3.1 Diversifying our workforce

We have worked hard to diversify our board in the past 12 months and our focus in the coming 4 years will be on our workforce. We have strong foundations and a good track record in this area through successfully recruiting from lower socio-economic groups, with flexibility about education qualifications, learning disabled and physically disabled staff. Our age and gender bases are good

There is still much to do and our focus will be on our developing our recruitment and selection procedures and on partnerships with NE Autism Society for example to continually increase the diversity of our team.

We have both an opportunity and a challenge in that the North East jobs market is relatively modest and taking a role up in Sage Gateshead can mean relocating to the region specifically to do so. This is an opportunity to grow and develop a workforce and our development of Creative Apprenticeships will support this goal.

4.3.2 Training and developing our workforce

Our goals for our team in this new business plan period are to become a learning organisation, across the whole organisation, diversify our workforce further and become known for our work with Creative Apprentices.

Through this period we will continue to work on culture within our team, skills levels and our management systems, aiming to embed a cross-organisation culture and practice in management and to increase levels of delivery.

We will continue to develop as a learning organisation. Our organisation wide Learning & Training plan will continue to develop in scope and we aim, by the end of the period, to be able to benchmark as a peer with other NPO in receipt of similar level grants in terms of % spend on training. We have identified a clear need to up-skill and knowledge across the organisation, alongside strong and consistent induction and ongoing training as a base-line.

Having diversified our board in the life of this NPO period, we plan to make a high priority the further diversification of our workforce, working closely with our People Committee.

4.3.3 Developing volunteers

Using the Great Exhibition of the North as an opportunity, we will work with Baltic, GMBC and NGI to develop a programme of cultural volunteers. This will underpin our delivery of the exhibition and will be a springboard for an ongoing renewal of our approach to volunteers which will particularly inform our community engagement, the nature of our customer experience and our corporate partnership relationships.

4.3.4 Skills development – creative apprenticeships and work placements

Creative Apprentices and placements will move from our Learning & Participation Programme to the centre of the organisation and be held within our HR team. We will be one of three organisations in our area to be involved in the Apprenticeship Levy and we see this as an opportunity to build new partnerships to develop Creative Apprenticeships across the region supporting diversification of workforce across region. We will aim to have an apprentice in every team and we will work with partners such as North East Autism Society to ensure strong links in to this programme and champion a diverse work place. We will work strategically with North East England Chamber of Commerce, North East Local Enterprise Partnership, NGCV and North East Culture Partnership on ensuring that young people across the region are aware of the potential in Creative Apprenticeships.

We offer 60 work placements per year, mostly targeted at young people from lower socio-economic backgrounds ranging from a day visit to a 6 week placement within a particular team. We plan to continue to use this programme and the part-time member of staff dedicated to it, to work in partnership to focus on equality of opportunity and ensuring those with particular needs, such as autism or learning disabilities, can gain experience.

We also offer a small number of placements as part of advanced training – the Clore Leadership Programme and the Hong Kong intern programme for example.

4.3.5 Artist Development

We have separated this into development of performing artists and music leaders for clarity, but there is often a strong overlap between these two areas and indeed we believe that the more there is an overlap the better.

We see our artist development activity as part of workforce development. It is outlined in detail in our answer to Goal 1 and noted here, specifically around artists who are members of our workforce. One third of our team are engaged as musicians or artists, many of them on a part-time basis. Our support and training of these artists benefits

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All musicians in these two categories are treated as members of staff and are part of the PDR process and are part of the organisation's Learning & Training Strategy. In addition, we have training plans for our 37 full time musicians in the Royal Northern Sinfonia and our musicians and leaders within our Young People's and Public Engagement Programmes. These are around diversifying the workforce and skills base.

Through our work on Creative Diversity, we have recently reviewed our artist recruitment and selection procedures to ensure that we continue to diversify our workforce. These are outlined in our response to the Creative Case for Diversity question.

A core focus in this period in our Young People's Programme and our Public & Community Engagement Programme is on training and development. This includes training artists who are working for us and training in partnership programmes. In both instances our activity is supporting the wider ecology,

seeding skills which can be used beyond Sage Gateshead's involvement. We have a set of highly developed specialisms which can be used to train music leaders – in work with older people, in work with young people who are NEET, LAC, SEND, in autism friendly customer service and project delivery and in work with early years.

Our partnerships in this are Samling, Durham Cathedral, Generator, New Writing North, Sound and Music, Orchestras Live, Halle, RLPO, Newcastle University, Northumbria University, Sunderland University, Durham University, North East Autism Alliance, Gateshead College, CCSkills, Clore Leadership Programme, Hong Kong Intern Programme, Guildhall School, Colston Hall.

4.4 Supporting the wider sector

We are committed to the continued development of the cultural sector in the north and to its place in a wider civic infrastructure.

We see core priorities as:

- Supporting the emerging new cultural infrastructure of venues and activity in our area through knowledge exchange and advocacy
- Ensuring that the voice of the north is heard in national conversations
- Ensuring artists are an active part of conversations
- Encouraging debate around digital development and creative diversity

4.4.1 Convening and supporting development

Together with TWAM and Baltic, we convene the local cultural sector as Gateshead Cultural Partnership on a quarterly basis. This brings together all of the cultural organisations and artists based in Gateshead to discuss needs, support and share experience. In particular in coming months we will work together on a joint response to the Great Exhibition of the North.

Together with Generator, we convene the music sector from the region around the Case for Culture. This is also an opportunity to share experiences, possible joint projects and look at how our activity supports the Case for Culture. In October 2016 this group convened for the Creative Industries Federation consultation on the impact of Brexit, ensuring that a North East perspective was represented.

We have established 6 regional partnerships – focuses for across the organisation, supporting partners in these locations to build levels of cultural engagement, specifically where we have specialisms to offer:

- o Durham City – working with the cathedral and choir (as the other professional classical ensemble in the region) to build the city's reputation as a musical city
- o Carlisle & Kendall,
- o Middlesbrough – supporting MTH with its programming and new venue
- o Darlington - supporting Darlington Civic and Hullaballoo with programming and new venues
- o Hexham – supporting Queen's Hall with its programming around folk music
- o Berwick – supporting with classical programming
- o Sunderland – supporting CPP, Sunderland 2021 and Sunderland Culture Partnership with classical and folk activity

We will use our facilities to hold two weekend long 'open houses' for artists to come together to meet, share ideas, discuss issues. We will use open space to set agendas for these gatherings and will look at whether they can also develop thinking around digital and creative diversity.

4.4.1 Regional engagement

In addition we undertake the following:

- o Advocacy, leadership and convening for the sector through Newcastle Gateshead Cultural Venues
- o We are an active member of GSP alongside health, police, 3rd sector, private and local authority partners. Together we recently mapped cultural engagement in Gateshead and can now look at how this connects with commissioning and investment across the borough
- o We have recently become lead cultural partner with NEECC with the option to work together on research and profiling in collaboration with the private sector
- o We are members of national and international networks which look at practice and development and we actively bring knowledge back in to the region from these networks: Music Beyond Mainstream, British Association of Concert Halls, European Jazz Network, European Concert Halls Organisation, ISPA, Tessitura Community, Association of British Orchestras. CCSkills National Conference, Cultural Learning Alliance, What Next.

4.4.3 Knowledge exchange

Members of Sage Gateshead staff sitting on boards builds networks and enable the exchange of good practice. Team members are encouraged to volunteer on boards and Sage Gateshead responds positively to requests for potential volunteers. Here is a sample of the charity boards which our team is currently on, demonstrating deep connections with our wider civic life:

BACH, Edinburgh Quartet, BBCNOW, Awakenings (Mental Health charity), Capturing our Coast charity, SarasHopeFoundation, Exhibition Park Trust, Northern Children's Book Festival, Blue Cabin, Dinnington Village Hall and Scouts, Soundsense, Gateshead & SouthTyneside, Newcastle & Northumberland, Sunderland Music Education Hubs, and we have 31 school governors on our staff.

Through NGCV we run a number of peer groups – HR leads, Operations Directors, Creative Learning network, Finance leads – so that members of the ten organisations can share experiences and information.

We have set up Memorandums of Understanding with nationally based companies who want to work in the North to help them understand the local context, such as Streetwise Opera and Open Up Orchestra. This involves us providing local data and intelligence in order that they can successfully bring their expertise into the area to the benefit of local people, without having to set up a full scale operation in the North.

Goal 5

**Tell us how you plan to use our funding to contribute towards Goal five.
No more than 20,000 characters.**

Every child and young person has the opportunity to experience the richness of the arts, museums and libraries.

5. Introduction

Increasing levels of cultural engagement in the North was at the heart of Sage Gateshead's founding mission and the organisation set a new bar in terms of the layout of the building and the scale of the ambition for its creative learning programme within its first five years. There is much evidence of the opportunities and impact which this has had for CYP as artists, learners and audience members. 12 years on, we have a new strategic focus on CYP and a new ambition to increase access to music and to support overall provision for CYP in the North.

As a young organisation and in our local context, we have a unique role to play in developing young artists and encouraging young people of all backgrounds to hear, participate and make music. Our context means we can particularly focus on strategies to link international level excellence with a wide base of inclusion.

5.1 Your funding

We will use your funding to offer opportunities to CYP in two locations: in our building (maximising its exceptional facilities to encourage CYP as artists, audience members and learners) and across the region (particularly to encourage first access to music). Across both of these areas we will take a strategic approach, where possible supporting and training others to deliver, rather than always delivering ourselves.

We will use your funding to reach CYP from the north east as audience members and as participants, linking this to Arts Award and Artsmark. We will particularly focus on CYP from NewcastleGateshead but in our work with MEHs, universities and FE colleges our reach will be across the north. We will also target specifically those who:

- o show particular talent in music and who are wanting to study music at the highest level
- o are vulnerable or live in challenging circumstances, particularly those who are NEET, LAC or SEND, need early years support or who have health challenges
- o who want to develop their skills to pursue a career in the creative industries.

We will use your funding to give CYP access to our artistic assets - the music we are programming as a venue, Royal Northern Sinfonia and Folkworks - and to deploy our particular specialisms in practice - arts in health, early years, LAC and NEET.

In this answer we have described our new Young People's Programme. Beyond this, there are other ways in which we reach CYP and these are described in our answers to Goals 1, 2 and 3.

5.1.1 Context

Our recent Programme Review recognised four things in regard to CYP in our regional context:

- o In part due to our own efforts and in part due to an active independent music sector, the leadership and provision in creative learning for CYP has increased over the past 15 years.
- o One of the unique characteristics of the NGCV network is that all of the organisations are very actively involved in provision for CYP, which provides a unique opportunity for NewcastleGateshead in co-ordination and increases in impact.
- o We are part of a local and regional network of arts and cultural organisations,

MEHs, Universities, local authorities, health and social care and voluntary sector organisations working independently and in partnership to ensure active involvement in arts and culture for every child and young person in the region both in and out of school.

o We are part of a national network of venues and through specialisms developed locally, we can contribute nationally.

These factors have influenced our thinking about our new programme and our aim has been to develop a Young People's Programme which fits into the wider ecology and supports it as well as having its own clear strategic purpose.

5.1.2 Key successes 15-18

In 2015/16 we worked with 12,539 CYP and delivered 5018 separate sessions. This breaks down as:

- o 403 as young artists
- o 6,212 through schools programmes
- o 3,981 early years children and their families
- o 1,943 young people engaged through social impact projects

Our programme is characterised by depth, its bespoke nature and the range of its access points - many of the CYP are receiving over 100 hours of activity with us per year.

This is a snapshot of some of the successes during our current NPO period:

- o Two members of In Harmony have entered our Centre for Advanced Training
- o 33 of our In Harmony pupils have passed ABRSM exams
- o 'Sharing the Stage' has extended our In Harmony programme into the wider community
- o Our Youth Ensembles have performed at the Proms and in 6 European countries and collaborated with 10 other international youth ensembles
- o Our Music Sparks collaborated with Billy Saga through a British Council exchange programme
- o Silver Linings, our work with over 50s, brought forward compelling research about the value of music making to increase health and wellbeing in this age group
- o Royal Northern Sinfonia began 'Classics4Kids' reaching a first audience of 600 and gave a first relaxed performance reaching 800 people.
- o Saxophonist Arun Ghosh and 90 primary school children from 3 Gateshead schools created a new work to open Gateshead International Jazz Festival

Participant testimonies:

"I have also had a lot of family issues at home and been stressed but when I've went into the arches, I've felt very positive about myself and talked my problems over and over, I now know instead of getting angry and lashing out, it's always better if I write it down and make it into a lyric. Because of Sandy and Paul's advice, I now feel a lot more comfortable. When always focused, confident and very chilled out."

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"The last few months have been an amazing journey for everyone involved and I'm very lucky to have been able to share it and I'm very proud of everyone I've been able to work with over the months. I suppose my best memory is going to be the day of the music spark show, which was an amazing experience."

(Anthony, Community Music Spark participant)

“Both my sons study with the Young Musicians Programme, both of them are at CAT and Christopher is in Quay Voices. The opportunities that Christopher has had through studying with YMP have helped to make his career choices for the future as he is now going to study Music and Drama in September.”

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5.2 Plans for 18-22

Our new Young People's Programme will break down into three areas:

- o Creative Learning Programme, focused around RNS, folk and visiting artists to reach a large number of CYP in NewcastleGateshead as audience members, participants and learners
- o Centre for Young Artists – as a part of our approach to artist development, supporting young people from the north with a talent for music
- o Music for social impact, developing practice and training across the north in music with young people who are hardest to reach

Across all of these areas musical inclusion and excellence will be central to our approach and we will offer Arts Award and support Artsmark across all three areas.

5.2.1 Creative Learning Programme

We will offer CYP in the area, and particularly in NewcastleGateshead, performances and creative learning projects which support them to develop as audience members and as participants. We will deliver this in a highly networked way with a wide range of partners, most specifically NGCV and MEHs and with training and support delivered by us to build the local ecology. We will use our venue programme, unique artistic resources and specialisms (e.g. in folk, RNS and musical inclusion) to the benefit of the region and increase support for Arts Award and Artsmark. This programme will be both in our building and in local settings, including schools. This is a significant change in approach in this area. We will work collaboratively with our MEHs, HE and FE rather than offer any activity which competes; we will use our genre specialisms and needs specialisms – which we will use to shape activity and we will develop our digital content particularly.

Our partners in this will be Culture Bridge North East, Newcastle Gateshead Cultural Venues, MEHs, Durham, Newcastle, Sunderland, Northumbria Universities, Gateshead College, schools and school trusts, Open Up Orchestra; Orchestras Live, GEM Arts, Seven Stories.

We will offer a programme of live and digital activity:

- o RNS creative learning programme, connecting with their artistic programme
- o Folkworks creative learning programme, Pass It On
- o Projects built around visiting artists for events or festival, such as GIJF.
- o An opportunity for every school in NewcastleGateshead to bring pupils to a performance each year
- o A Young People's Takeover Festival in Sage Gateshead
- o SEND conference in 2018 and delivery as requested by MEHs around LAC and NEET specialisms
- o Region-wide approach to CPD and training with MEHs
- o Joint project for early years with Seven Stories, supporting best start in life for the region, a digital song and story bag

We will also work with Durham, Newcastle, Northumbria and Sunderland Universities to add value to music degree programmes and to encourage cultural engagement by students through workshops, master-classes and performance opportunities.

We will also engage a strategic conversation and future plans across the MEH, University and FE network about the possibility of a joint approach to conservatoire level provision in the region.

5.2.2 Centre for Young Artists

This programme is for young people with a talent for music, supporting their development as artists, serving 1000 young people per year and delivered primarily in our building. It includes feeder programmes run by us and by partners across the region. Our emphasis through feeders will be on inclusion and equality of opportunity and our centre will model new ways to offer music study at the highest level with the widest base of opportunity. Key developments in this programme will be: we will maximise our artistic assets to the benefit of this programme – RNS, folk and visiting artists, we will build a continuum between our provision for under 18s and over 18s, so that there are strong pathways to progression and a clear single offer. Our partners in this will be Music & Dance Scheme, MEHs, Sunderland University, and Gateshead College.

Activity will be:

- o Centre for Advanced Training - part of the national Music & Dance Scheme network for students aged 8 – 18 providing weekly classes for 150 students across a range of instruments and genres with a graded bursary scheme starting with free places for those with household incomes under £20,000;
- Regional Youth Ensembles – Folkestra, Young Sinfonia, Quay Voices, Jambone with three termly programmes of ensemble learning, holiday residential and three tours a year, one of which is outside the UK and two festivals a year in Sage Gateshead showcasing students
- o Saturday School – modelling first access classes to a wide range of CYP aged 4 - 8, to ensure a broad base of progression to the CAT, offering weekly classes at four levels in strings, piano, brass and ensemble playing
- o Higher Education delivery – delivering a music degree with Sunderland University: BMus Jazz and Popular for 100 students.
- o Further Education delivery –Working in partnership with Gateshead College to deliver music performance aspects of the BTEC Level 3 Music Course. Students study with our music tutors and have performance opportunities in our Halls.

5.2.3 Music for social impact

The purpose of this programme is to create opportunities for children and young people in challenging circumstances including those who are NEET, LAC or SEND with particular emphasis on early years/best start in life and collaboration with the health sector to build arts and health models. Our focus in this period will be on increasing our levels of training and CPD regionally to strengthen the ecology. Our programme includes two strands of work, both outside our building. Our Youth Participation programme will deliver a programme of music supporting vulnerable young people to engage in music. As part of this programme we are one of 13 national strategic Youth Music partners with a regional remit to support other projects in the region with training, networks and

development. We will also develop our In Harmony Newcastle Gateshead, expanding to other schools and nurseries in West Newcastle and continuing a programme of community engagement to support CYP who are within the programme.

Activity

Working in partnership to develop models and practice which address inequalities and support: children 0 – 7 to have the best start in life; SEND; LAC and NEET young people and to train and support individuals and organisations in engaging children and young people in challenging circumstances through music.

Our Youth Participation programme runs across ages from early years to young adults:

- o Loud & Clear – training and delivery sessions to Looked After Children in settings for 0-5s across the region
- o Hospital choirs – Piloting a new model in the region's hospitals setting up children's choirs working with the health sector to embed, so that Sage Gateshead can skill up and leave a legacy programme.
- o The Arches – a weekly programme for 400 young people who are NEET to develop their skills and artists and progress through qualifications. Participants are a combination of self-referring and referrals from PRUs.
- o Music Sparks – 25 young people with SEND in weekly sessions developing their skills as artists based in Sage Gateshead.
- o Training sessions through the region for artists and Music Leaders to develop their skills in working with CYP who are LAC, SEND or NEET.

In Harmony Newcastle - 550 CYP involved – focused around Hawthorn primary School, adding 2 additional schools & an early years setting. 600 sessions delivered as group teaching, ensemble playing, performances.

As noted in 5.1, there are three further ways in which we will support CYP:

- o Creative Apprenticeships and Placements for Under 25s (in Goal 3)
- o Family focused activities (in Goal 2)
- o Music for Young Ears for under 12 months, Under 7s and 7+ (in Goal 1).

5.2.4 Artsmark & Arts Award

We will continue to promote and support Artsmark and Arts Award and with a dedicated team member who will lead on engagement with partners and with schools, we will focus on the support we can offer in these two areas. This role will sit across all of our programmes of activity from the centre for artist development to social impact work.

There is an opportunity in a more strategic relationship with our seven Music Education Hubs and in collaboration across the NGCV network to develop Artsmark levels and clusters with groups of schools. We can be clear about the support which Sage Gateshead can offer alongside the MEH and other arts organisations' offer across the wider performing arts.

5.2.5 Musical Inclusion

Musical inclusion is embedded across our three strands of work, seeking to create equality of opportunity for CYP regardless of their background or circumstances. This applies equally to our Centre for Young Artists as in our Social Impact activity and in the way we price and promote our performance programmes for families and young people. We actively champion inclusion in the material about our organisation and its work.

We are a national partner of the National Foundation for Youth Music, developing innovative models for practice in NEET, LAC & SEND engagement and musical progression and we are part of a network of In Harmony projects improving children's academic achievement, personal progression, life chances and community engagement. Our local partners - Children North East, NHS Ferndene, Barnardos, Newcastle United Football Foundation – share an approach around inclusion which ensures that we develop and share practice across a wider charitable network.

5.3 Maximising impact

We will ensure that we maximise the impact of our work through the way in which we capture data and evaluate, the way we work in partnership and how we contribute to national activity for CYP.

5.3.1 Research & quality framework

We identify need in through partnership research, which leads to project design. For example, we have worked with the Public Health teams in Newcastle and Gateshead to map need, the CYP population and our reach in order to target our activity more closely.

We have three frameworks through which all projects are established and evaluated : our own Quality Framework, a Critical Reflection Framework and ACE's Quality Principles (which maps very closely to our own Quality Framework). Every new project uses these frameworks to plan and review and has a theory of change approach applied at project design stage.

Our outcomes framework was developed in reference to your Quality Principles. This goes hand in hand with a new quality framework that we developed and began trialling in 15/16 and is now used across our work with CYP. It includes safeguarding to ensure the highest standards of practice are applied across all projects and partnership working. Our new quality framework holds reflective practice at its heart and maintains the flexibility to focus on different elements of quality depending on the context of the project.

5.3.2 Data capture and evaluation

We have a dedicated team member leading on data and evaluation around our work with participants and this ensures that we have thorough understanding of the profile of our CYP. We use this to our benefit and to the benefit of the wider NGCV network as a joint approach to work with CYP evolves. Our evaluation framework for our work with participants has long ensured that participant voice is heard and shapes future planning. We have used this to develop our new Critical Reflection Framework which we will apply across all of our activity, not just our work with CYP.

5.3.3 Partnership with NGCV

Working with NGCV we are developing City of Dreams, a 10 year commitment to delivering a step change in CYP opportunities and cultural engagement in NewcastleGateshead. Our data and evaluation and musical inclusion specialists are currently leading on mapping existing programmes of delivery and developing a bespoke programme of opportunities for LAC.

5.3.4 Our role in the region

We recognise and understand that we have a role to play in the region and are

moving from an initial phase of leading on, and modelling delivery to a focus on strategic working and training others to deliver.

We are active partners across networks in three spheres: artist development, music education and music inclusion. We are part of the NE MEH board and part of the strategic planning within this group. We play an active part in the Gateshead LCEP and have helped shape activity on this. We are actively engaged in Bridge activity to which we have a seconded staff member. We work as lead partner with Youth Music in the region, modelling ways of working with young people who are hard to reach.

Sage Gateshead and Helix Arts will continue to deepen their existing relationship and develop an equitable partnership that supports the artistic development of participants and artists using data to deliver increased access and inclusion in participatory settings.

5.3.5 Participating nationally

We are building a partnership with Colston Hall and Barbican/Guildhall looking at how, in different parts of the country and with different sets of local needs, these three organisations can learn from sharing insight around their work with Music Education Hubs and Cultural Education Partnerships. It aims to achieve:

- o Greater inclusion and engagement for under-served communities.
- o Diverse progression routes for CYP.
- o Strengthened professional development programmes for teachers and artists in participatory and socially engaged settings.

Further, we see our national role with CYP as:

- o In our Young Artist Centre building new models of practice around excellence and equality of opportunity.
- o Modelling best practice in Musical Inclusion.
- o A leader in Creative Apprenticeships.
- o An active part of the In Harmony Network.
- o An innovative provider of cultural engagement activity through our unique specialisms in folk, classical and jazz, SEND and early years.
- o Working in networks such as Creative Learning Alliance, Youth Music, Creative Industries Federation HE group.

Organisation profile

How will you effectively lead and manage the programme of work that you propose?

(Please use no more than 14,000 characters)

We will achieve this through high quality leadership, a clear set of goals and incentives, management through planning, process and monitoring and a clear view of risks and mitigations. We outline this approach below.

M1 Leadership

We have recently put a new leadership team in place and restructured our teams. This included a mix of retaining staff, reducing the numbers in our management team and bringing in new people. As a result we have a focused, appropriately skilled and mandated team.

M1.1 Leadership team

Our executive team comprises a Managing Director, Chief Operating Officer, Director of Marketing & Communications, Director of Learning & Participation, Director of RNS & classical programming, Director of Performance Programming, Finance Director.

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Our new management structure includes the following changes:

- The introduction of a Chief Operating Officer to oversee operational and commercial running of the organisation. This has resulted in better practice around HR, a more commercial approach across the organisation..
- A qualified, experienced, Finance Director, which has led to a step-change in engagement with finance across the organisation, increased skills and knowledge through an in-house training programme and definitively accurate financial information.
- A new programming team with new leadership for RNS/classical programming, Contemporary Programming and Learning & Participation which has led to fresh perspectives which combine picking up successes and value in current activity and assets and new thinking about future directions, including the need to have a coherent mutually supporting programme to make best use of our artistic assets.
- Rather than a single Learning & Participation Department we are moving to two smaller teams – Young People’s Programme and Public and Community Engagement and moving all operational matters for what was previously Learning & Participation into the central operations function.
- We have set up a data & business support team which handles all data (including CRM and analytics), systems, the planning tools and cross-organisation reporting. Alongside this, we are currently creating a small research and evaluation team which will serve all programme areas, rather than, as previously, only Learning & Participation.
- We have just appointed a Director of Marketing & Communications bringing experience at this level into the organisation for the first time. The Marketing & Communications team operate on a matrix structure working closely with their programming and commercial colleagues and the data team.

Recruitment to the leadership team involves board members and recruitment to the management team involves members of the leadership team. A development plan is in place for both the leadership and management team, as these have been recognised in the recent organisation development work as crucial to the organisation’s next phase.

M1.2 Succession planning

We have just been through a period of very effective succession planning at

board level and successfully recruited new members. Our next governance developments will be – development of our advisory voices and in 18 months we will start to work on Chair succession.

With a new leadership team there are no immediate succession needs. Our focus at present is on ensuring the roles work as a matrix, moving away from a traditional set of briefs around functions, to cross organisational roles. Our management team, a mix of joiners and people who have developed within Sage Gateshead, is a new group of senior managers who work as a team leading delivery. Our succession planning is underpinned by an improved line management and performance review system, which we have implemented in the past 12 months.

M1.3 Board oversight of our programme

We have three sub-committees of the board (People, Finance, Programme and Development) which oversees the detail of our activity. Our new board structure and board members are positioned to give greater connection at governance level to how we design and drive our programme of work. Our Programme and Development Group includes experience in orchestras, digital development, venue management, community engagement, creative learning, artist development, folk music. Within the board there is also a diversity champion and a digital champion.

M2 Goal setting and planning

We use our annual strategic planning cycle to support our programme planning, taking plans through a review of: goal setting; audience objectives; programme of work to address needs; financial planning & risk assessment; monthly monitoring and annual review.

M2.1 Our framework

The aims of using this framework are:

- o To keep our focus on our audience development goals
- o To find ways to link up the different elements of our programme
- o To maximise depth of engagement
- o To maximise the use of our venue and resources

Planning is led by the Managing Director and Chief Operating Officer. We use Artifax as our central planning tool, a set of Artistic Planning protocols and timelines and a planning group called Senior Programmers.

Individual programming teams develop their programmes to feed in to this central process. Across all of this we have Public and Community Engagement function which looks at programming in our public spaces, community engagement projects and insight activity. This function also looks at insight and context material about our audiences and our potential audiences and we use this to shape our audience development and, subsequently, programme plans.

As part of our annual planning cycle our Programme and Development Committee reviews programme plans against outputs from the previous season's evaluation, audience objectives, budgets and risk assessment. They then recommend the programme to the board for approval.

M2.2 Self-evaluation

We use the following management tools as quantitative performance measures:

- o Weekly commercial sales reports
- o Monthly management information packs
- o Monthly KPIs report

These are shared across teams and used monthly by every team member to review performance with their line manager.

We review qualitative impact through a Critical Reflection Framework. The purpose of this is to use a standard and structured way of reflecting on programme activity drawing input from a triangle – audience, producer, artist – to build a rounded picture of what has been achieved in a project and to develop a new habit of reflection around quality and innovation. We apply this process to 20 major projects each year across areas of our programme (such as festivals, key concerts or projects in our RNS series, Folkworks summer schools, Silver Festivals, Summer Studio, GIJF). The process takes in:

- o Project goals
- o Map of our the stakeholders are in the project – audience, artists, producers
- o Arrangements for feedback – qualitative and quantitative – and cross-reference that they will tell us whether we met our goals
- o How and who will gather the material
- o Assessment upon receipt of material of whether project goals were met
- o Review of what we will keep/change for a next iteration

M2.3 Ensuring our programme is safely delivered – Health & Safety and safeguarding

We have policies and procedures which cover activity in the building and outside the building (for example on tour or in residential activity). There are four principle components to ensuring safety:

Health & Safety, Safeguarding, Risk Assessment and Communication.

Our Health & Safety and Safeguarding Group are part of our governance structure, reporting to our People Committee and ultimately to the board. They are chaired by our Head of Operations and Head of Customer Experience. During 2016 we have undertaken a review of our Safeguarding training and arrangements and have increased the level of training across the organisation and have filmed all of safeguarding material so that staff can both read and hear material on the subject. Our Safeguarding arrangements relate to staff, participants and audiences online and in person. Between May 2015 and July 2016 we have had 177 H&S incidents (25 Near Miss; 151 Minor; 3 RIDDOR) – a low risk level for the organisation and no trends within this period. All members of our Customer Experience Team are trained in First Aid and submit reports on any incident or near miss to the Head of Operations and Managing Director. The Health & Safety and Safeguarding Group review all incident reports on a weekly basis with a view to identifying trends. During the life of our current plan we have seen one trend – fire alarms which triggered three times in two months without incidence of fire – and put in place arrangements to address the matter (a fault in the system).

All operations in our building are risk assessed – every performance, conference, class or event – separately. All tours, residencies and external venues are also assessed. Each category uses a slightly different set of criteria to assess different kinds of risk. Risk Assessments are reviewed by the Head of Operations on a monthly basis to ensure that standards of assessment are maintained.

We run a regular cycle of operational meetings to ensure high standards of operational planning and delivery. These are a Weekly Operational meeting looking at 9, 6 and 3 weeks ahead, Daily Operations which looks at the next day and a SHOPS meetings looking at additional activity which has been added after 6 weeks, so has not been through the 9, 6, 3 countdown.

Beyond these four components of operational standard, we have a large-scale emergency action plan and communications plan, we have all staff (and partner) terrorism briefings twice a year and we practice evacuations twice a year.

M2.4 Arrangements for reporting and performance review with ACE

We have an annual reporting cycle for our programmes, our business plan (which includes our audience development and digital plans) and our equality & diversity plan. We produce formal business plan reports every six months for our board and these are also shared with you and GMBC. In addition we meet ACE once a month to review activity and planning and hold an annual review meeting, followed by an annual review letter. In the 2015/16 review process with ACE, we have used ACE's annual review letter as a part of our 17/18 planning cycle to ensure that we maintain strength where we are meeting ACE's goals and develop where we are not.

M2.5 How we work in partnership

We have included information about our programme partnerships in our answers to Goals 1, 2 and 5. At the end of our season in August each year, we review our partnerships as part of our annual review, with a view to this feeding developments in 12 months time. We have recently established a set of partner protocols to ensure that we have clear arrangements with ongoing partnerships. In addition to programme partnerships, we have a number of strategic partnerships through which we are engaged in research, policy, sectoral development and sectoral profiling. They are an important part of how we lead and manage our own programme of activity – they give it context and relevance – and they are a measure of how we fit within our wider sector.

M3. Managing risk

Our overarching strategic planning cycle and the artistic planning cycles outlined above, ensure that we have a set of processes which allow the organisation to scan the long-medium term horizon, risk assess activity before it is committed, review weekly, monthly, quarterly, annually and involve our board, through their sub-groups, in decision making about how our programme should deliver our strategic goals and how we remain sustainable.

The work undertaken in the past 18 months to set up these processes has begun to yield evidence of change after just one full cycle. Already we can see greater organisation-wide understanding of mission and purpose, commitment to shared planning, joint decision making and increased connection between different parts of the programme. That said, we acknowledge that this is about bedding down process into a young organisation and it will take another cycle of our next business plan before this is all deeply rooted.

We see our key strategic risks and their mitigation as:

- Health & Safety, Safeguarding & security, mitigated through robust management

and governance structure for monitoring, training and raising awareness.

- Financial sustainability - the changing national political and economic environment leads to decreasing levels of funding and a slowdown in sales, mitigated by continued commitment to building the business model, reserves and alternative streams of income.
- Reputation of Sage Gateshead - perceived drop in quality through lower level artists, lack of financial risk, reduced audience development or customer experience – mitigated by a planning process which has a mix of KPIs .
- Strategic context - the changing leadership and continued reduction in funding to GMBC leads to culture being downgraded as a strategic priority for the borough, and a lack of engagement with Sage Gateshead over major projects such as the quays development, mitigated by continued engagement and joint advocacy of the impact of 25 years of investment.
- Capital development - Sage Gateshead does not secure the necessary funds for either ongoing repair or one-off capital projects needed for the building to support plans for audience development and business resilience, mitigated by a clear fundraising plan, strong case for support and board involvement in the project.
- Lack of capacity/capability in staff and artists – inability to recruit and retain the right people to deliver quality and scale. Mitigated by skills development initiatives, diversifying workforce and strengthening the sector and fair pay.

How will you ensure financial viability?

(Please use no more than 14,000 characters)

We will contain and manage our costs, develop areas of opportunity in income and we will mitigate financial risk. We will do so in a way which is mission focused, believing that a clearly articulated ambition alongside strong financial planning and management will deliver both financial viability and a new level of success for the organisation as it approaches its teenage years.

F1. Context

A benefit of being a relatively young organisation, set up with an awareness of the need to have a broad range of income streams, is that our income is well diversified. This gives us a good range of opportunities to develop our income. Furthermore, the work we have recently put in to OD means that our model is stabilised and our financial monitoring, reporting and decision making are strong, putting us in a good position to manage our finances through the coming four years. This is crucial given what we can see in the external environment and the pressures which could come to bear in the period.

F1.1 Our financial model

Our earned income is 58% of turnover, our ACE and GMBC grants are 20%, voluntary income is 15% and investment income is 7%. Within earned income we include ticket sales, fees, commissioned work and traded income. Within voluntary income we are active in all sectors including public sector grants, trusts and foundations, corporate donations and sponsorship and individual donors. Whilst this level of voluntary income is normal in London, it is at an exceptionally high level for our area and testament to the high levels of ownership felt for Sage Gateshead locally and the organisation's national role. We have 20 corporate partners and 23,700 individual donors, who have contributed £1.2 million over the past two years.

We spend in the following cost centres: Venue [including all concert/festival programming, conferencing & commercial trading]; RNS; Young People/Public Engagement; Executive. The executive cost centre must ensure that the other three areas balance investment and risk in their budgeting and delivery. Under North Music Trust, we have Music North Limited, a wholly owned subsidiary which handles all of our commercial trading, including our conference & events business, catering, car parking & retail. We have recently brought our catering in house, following a detailed assessment of viability and capacity. This change should increase levels of income from trading, without requiring an increase in turnover.

F1.2 Management & monitoring arrangements

We have a Finance team led by a Finance Director, who oversees financial planning, risk assessment, analysis of performance and investments and a Finance Controller, who oversees accounting, reporting and internal training. We have a Finance Committee with a new set of Terms of Reference and annual cycle of business. We use the following management and monitoring arrangements:

- o Weekly commercial sales outlooks across all areas of B2C sales. These are reviewed by the executive and teams and used to plan marketing activity.
- o Monthly management information pack. This is reviewed by the executive and used to flow through to 1-1s with direct reports through the organisation. Alongside monthly KPIs this information forms part of our monthly performance clinics which each member of the team has with their line manager.
- o Quarterly business plan reports – These are reviewed by the board at their quarterly meeting (they receive monthly financial information via a board

update)

o Annual audit – this process is overseen by an independent audit committee reporting direct to the board, providing independent scrutiny of the process.

Our finances are managed by a standardised set of practice across the organisation and set out in a Financial Procedures Manual. This is used in induction and as part of our managers pack to ensure that common practice is used and compliance happens across the organisation. We are particularly focused on safeguarding around cash and financial data.

We have two endowment funds from which the income is directed to North Music Trust to be spent on its activities. The funds are held in investments. One endowment (£6 million) is held on our balance sheet and one (£11.5 million) is held by the Community Foundation. They are monitored against investment mandates set by an Investment Committee on behalf of our board. The funds on our balance sheet are managed for us by Rathbones, a local investment firm, working to a mandate with an ethical clause and with a target income return of 3% whilst protecting capital value. The Community Foundation and North Music Trust meet quarterly to review the status of funds held by the Community Foundation.

F1.3 Benchmarking on fair pay

We are committed to ensuring fair pay which reflects the skills of our workforce and the national market place we operate in to attract to senior leadership roles and artists.

Our payroll is our biggest single cost and with inflationary pressures, it is a constant challenge to budget for and agree the right levels of pay. All of our pay levels are over the Living Wage and we are currently operating a 'one-year off/one-year on' approach to inflationary increases. Our rates of pay for our administrative, front of house and back of house teams are benchmarked locally through NGCV and nationally through ABO and BACH.

We have recently benchmarked our pay for Music Leaders and Tutors throughout our Learning & Participation Programme, to ensure that there is equity in this pay. We benchmark our Royal Northern Sinfonia pay with the MU. We benchmark annually through BACH for our visiting artist fees, which are agreed on a project by project basis and which are subject to fluctuating exchange rates. These benchmarks are all showing inflationary pressure - we will keep monitoring this situation.

F 2 Plans for 18-22

Around our core artistic mission and existing commercial activities, we will seek to control costs and achieve efficiencies, seek new opportunities to develop our income and mitigate risks.

F2.1 Cost control

Having worked hard in the current period on our cost base and reducing this, we know that we need to maintain scale given our regional remit and the building which we inhabit. However we also know that our existing income streams are likely to come under inflationary pressure during this coming period, whilst our fixed costs are likely to go up.

We will continue, as we business plan each year, to build our spending plans from the bottom up and to look for ways in which we can improve. We have built an outlook review for the executive and senior managers into our strategic planning cycle, so that the challenges in any income reduction and increases in overhead costs are flagged at the earliest stage of the planning process. This allows us to be clear about the level of cost reduction which is required within any upcoming year. We will also continue to review strategies which align development and efficiency – such as our digital and environmental strategies, within which efficiency in our business is a component part.

F2.2 Developing our income streams

Our primary focus in this period will be growing our income through four areas: box office and ancillary income, fundraising, capital plans and our conference and events business. Our digital strategy identifies areas which can augment the aforementioned income streams beyond live activity.

F2.2.1 Box office and ancillary income

We know that we have spare capacity both in terms of the number of days when using Sage 1 is dark and in % occupancy when we are using it. We have to balance this against the modest scale of our market and the availability of touring artists who are coming to the region. However an increase in box office income of £500,000 (10% of existing levels) would make a significant difference to our overall financial profile. Over the past 12 months we have sought to increase our occupancy by both of these measures and we are starting to see results: in the autumn 2016 period we have seen a 12% increase in ticket income year on year.

Using a new confidence in our data and profiling, with a new Director of Marketing & Communications and a new matrix structure in our Marketing and Communications team, we will continue to improve our utilisation of Sage 1 as our main source of box office income, continue to review the success of our programming in reaching and exceeding box office targets and seek to increase our average occupancy, review our ticketing approach, continue to improve our marketing and develop our brand position.

We are also developing plans for a Summer Season. The period June – August has always been the organisation's quietest period and the quarter in which it has been most challenging to programme. We will use Great Exhibition of the North as a way of starting a new season and realising utilised building capacity.

In order to achieve the above we will need to make some investments – which are included in our 18/19 financial plans – in our website and marketing in order to target growth. These investments have been tested against business case and planned as part of our annual planning cycle.

F2.2.2 Fundraising

To date fundraising for Sage Gateshead had happened under a single banner, with a specific goal of establishing Sage Gateshead as a charity. Our plan for the period will break down our fundraising against the following areas of our programme, with specific plans against each area: Royal Northern Sinfonia, Folkworks, Artist Development Programme, Young People's Programme, Festivals & curated programmes – particularly across classical, jazz, folk, Americana and popular programming and capital.

We will, however, be careful to maintain Sage Gateshead income around corporate partners, accessing the whole of our programme, specifically our venue and events and conferencing partnerships; Sage Supporters who access priority booking and discounts and major donors who are committed to the overall project.

Section 43 (2)

F2.2.4 Conference & events business

We have a five year plan for this area of our business. With some additional investment in marketing in 18/19 we should see this area reach its full potential (given the space and market available to it) during 19/20. In addition to ensuring this area fulfils its potential, we are increasing the connections it has with our corporate fundraising team, so that the sales team has a wider range of products to place as its networks and reach increase.

F2.2.5 Orchestral Tax Relief

We have not yet got figures for the first year of OTR, but expect to be able to claim from the current financial year and on an annual basis. All required arrangements for doing so are in place. In our current financial circumstances, this contribution will be used to build our unrestricted reserve and the overall resilience of the organisation. At a time of uncertainty and likely continued pressure on other income streams OTR will play a critical role in enabling us to steer our path to balance financial viability with artistic risk and audience development. In particular, once its level is known, we expect that it can play a crucial role in supporting RNS to deliver on its new vision of an international chamber orchestra for 21st century.

F2.2.6 Service delivery

We have reviewed possibilities for diversifying our income streams through for example car park pricing; providing services to other NGCV organisations (e.g. security and cleaning); developing our own catering service, which will provide external cater and we are investigating tendering for catering contracts, specifically in the culture industry. We are investigating opportunities around digital programming to “sell” our product to other venues; we are developing and creating an alternative front of house programming to attract the tourism pound.

We will continue to seek opportunities for the application of our services beyond our own needs (box office services, facilities management, outside catering),

but will primarily focus on delivery of our mission and on the areas outlined above. We believe that it is right for us to focus on these and maximising their potential rather than seeking new opportunities before our core is operating optimally.

F2.3 Reserves – mitigating risk

Along with strong financial management, we recognise that we need to build a financial safety net for the organisation both to manage challenges beyond our control and to enable us to take the right level of artistic risk. Our plan through this period is to build an unrestricted reserve of £1.2million by planning an operating surplus for each of the four years. We are demonstrating that we can do this in 2016/17 and 2017/18.

Beneficiaries

On this screen we ask you to give us some more details about the beneficiaries your activity is aimed at, if any.

By 'beneficiaries' we mean people who are actively involved in your activity (other than the artists or others leading the activity) by devising, creating, making, presenting or performing.

Tick here if your activity is specifically aimed at any particular age group of beneficiaries.

X

Tick the age group(s) that you expect to be significantly represented among beneficiaries.

Beneficiary type - Age - Aged 65 and over, Beneficiary type - Age - Aged 5 to 11, Beneficiary type - Age - Aged 12 to 15, Beneficiary type - Age - Aged under 5, Beneficiary type - Age - Aged 25 to 59, Beneficiary type - Age - Aged 60 to 64, Beneficiary type - Age - Aged 16 to 19, Beneficiary type - Age - Aged 20 to 24

Tick here if your activity is specifically aimed at any identified ethnic groups as beneficiaries.

X

Tick the ethnic group(s) that you expect to be significantly represented among beneficiaries.

Beneficiary type - Ethnicity - Any other ethnic group, Beneficiary type - Ethnicity - Asian/Asian British - Chinese, Beneficiary type - Ethnicity - Other White, Beneficiary type - Ethnicity - White - British, Beneficiary type - Ethnicity - Mixed/multiple - Other mixed, Beneficiary type - Ethnicity - White Gypsy or Traveller, Beneficiary type - Ethnicity - White - Irish, Beneficiary type - Ethnicity - Mixed/multiple - White & Black African, Beneficiary type - Ethnicity - Black/Black British other or Black/Black British not specific, Beneficiary type - Ethnicity - Mixed/multiple - White & Asian, Beneficiary type - Ethnicity - Mixed/multiple - White & Black Caribbean, Beneficiary type - Ethnicity - Asian/Asian British - Other Asian background, Beneficiary type - Ethnicity - Asian/Asian British - Bangladeshi, Beneficiary type - Ethnicity - Black/Black British - Caribbean, Beneficiary type - Ethnicity - Black/Black British - African, Beneficiary type - Ethnicity - Arab, Beneficiary type - Ethnicity - Asian/Asian British - Pakistani, Beneficiary type - Ethnicity - Asian/Asian British - Indian

Tick here if your activity is specifically aimed at disabled people as beneficiaries.

X

Tick the categories of disabled people that you expect to be significantly represented among beneficiaries.

Beneficiary type - Disability - Visual impairment/Blind, Beneficiary type - Disability - Hearing impairment/Deaf, Beneficiary type - Disability - Cognitive or learning disabilities, Beneficiary type - Disability - Invisible disabilities, Beneficiary type - Disability - Physical impairment, Beneficiary type - Disability - Mental impairment

Tick here if your activity is specifically aimed at individuals or groups with a particular sexual orientation identity as beneficiary.

☐

Tick here if your activity is specifically aimed at either male, female or 'trans* beneficiaries.

☒

Tick which gender your activity is specifically aimed at.

Beneficiary type - Gender - Male, Beneficiary type - Gender - Female

Activity location

Location details

Please tell us where your work during the period 2018-22 will mainly take place.

- If your work happens mostly within the area local to your organisation, please enter your organisation's own location details here.
- If your work happens mostly in a specific place that is not local to your organisation, please enter the details of the space or venue here.
- If you work in a consortium with another organisation(s), please enter your organisation's own location details and those of the consortium members.
- If your work has a national remit (for example, digital work or publishing), please enter your organisation's own location details.
- If your work involves touring, please enter your organisation's own location details and the details of any venues for tour dates that are confirmed or pencilled during the period 2018-22.

Using the tool below, please enter the location(s) where your activity is happening. To add a location, click the 'Add new item' icon on the left of the screen. To add more than one location, use the 'Save and Add another' button.

Name of the venue	Local authority	Booking status
Sage Gateshead	Gateshead	Discussed

Activity location details

Name of the venue or place (e.g. Oneplace Arts Centre): Sage Gateshead

Enter postcode: NE8 2JR

No postcode available: ☐

Local authority: Gateshead

Status of booking: Discussed

Attachment details

Description: Month 9 Management Accounts
Financial attachment type: Most recent management accounts

Attachment details

Description: Budget 18-22
Financial attachment type: Budget for the funding period

Attachment details

Description: 15/16 Annual Accounts
Financial attachment type: Most recent financial statements

Attachment details

Description: Budget 17-18
Financial attachment type: Detailed budget for next financial year

Attachment details

Document description: Memorandum of Association

Other attachment type: Governance document

Declaration

Data Protection and Freedom of Information

We are committed to being as open as possible. This includes being clear about how we assess and make decisions on National portfolio organisations and how we will use your application form and other documents you give us. We are happy to provide you with copies of the information we hold about you, including our assessment of your application.

We comply with all aspects of the Data Protection Act 1998 – to find out more about how we use your information please read our data protection policy which is available from our website.

As a public organisation we also have to follow the Freedom of Information Act 2000. We also have an information sheet about freedom of information. You must read the 'How we treat your application under the Freedom of Information Act' section of 'How to apply' before you sign your application. This information is also available from our website.

By signing this application form, you agree to the following:

1. We will use this application form and the other information you give us, including any personal information, for the following purposes.

- a) To decide whether to give you a grant.
- b) To provide copies to other individuals or organisations who are helping us assess and monitor grants, including local authorities, other lottery distributors and organisations that award grants. After we reach a decision, we may also tell them the outcome of your application and, if appropriate, why we did not offer you a grant.
- c) To hold in our database and use for statistical purposes.
- d) If we offer you a grant, we will publish information about you relating to the activity we have funded, including the amount of the grant and the activity it was for. This information may appear in our press releases, in our print and online publications, and in the publications or websites of the Department for Culture, Media and Sport (DCMS) and any partner organisations who have funded the activity with us.
- e) If we offer you a grant, you will support our work to campaign for the arts, contributing (when asked) to important publicity activities during the period we provide funding for. You will also give us, when asked, case studies, images and audio-visual materials that we can use to celebrate artistic excellence.

I confirm that, as far as I know, the information in this application is true and correct.

X

Name: Joseph Timlin

2. You have read and understood the section 'How we treat your application under the Freedom of Information Act'. You accept how we generally plan to treat your application and other related information if someone asks to see it under the Freedom of Information Act 2000. You accept that the information sheet does not cover all cases, as we have to consider each request for information based on the situation when we get the request.

Tick this box if you consider your application or any supporting documentation to be confidential information and would expect us to treat as such on receipt of a request for information under the Freedom of Information Act.

☐

Please be aware that if we do receive a request for information we will contact you in the first instance to obtain your views on disclosing the information relating to your application and whilst we will take on board your response above, we cannot guarantee that information will not be provided in response to a request as we are required to approach each case individually and ultimately meet our legal obligations.

3. Tick this box to confirm you meet our bank account requirements as set out in our Bank Details guidance.

☒

4. Tick this box if you or any individual involved in the delivery of this activity- has worked for Arts Council England in the last three years- is an Arts Council (area or National) council member- is related to a current member of staff or council member

☐

Submission summary

Page	Last Updated
Introduction	No Input Required
Organisation details	26/10/2016
Contact information	26/10/2016
Basic details	20/01/2017
Contributing to our goals	26/10/2016
Goal 1	27/01/2017
Goal 2	27/01/2017
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Declaration	27/01/2017