

Working Together

**A Handbook for Regularly
Funded Organisations
2018-21**



ALBA | CHRUTHACHAIL

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Section 1:

Working together

The Regularly Funded Organisation (RFO) Network for 2018-21 includes 121 organisations, supported by a three-year budget of £101.6 million, representing over a third of Creative Scotland's total budget over that period.

Regular Funding is central to the delivery of the ambitions set out in [Creative Scotland's 10-year plan, *Unlocking Potential, Embracing Ambition*](#). It provides three-year funding for organisations, giving them a baseline of support that they can build on to achieve their core aims and ambitions.

The RFO network is rich in its creative excellence, potential and ambition. It demonstrates significant reach across Scotland and across many areas of practice. The network supports thousands of individuals working in the arts, screen and creative industries and it connects with many partner organisations in Scotland, the UK and internationally. Importantly, it provides access to high quality artistic and creative experiences for people of all ages and backgrounds across Scotland.

Creative Scotland will work with the RFOs to support the vital contribution they make to the current health and future development of the arts, screen and creative industries in Scotland. We will report on the collective achievements of the network as part of our reporting to the Scottish Government, and evaluate the impacts of RFO funding with respect to benefits for the sector and for the people of Scotland.

We see the network of RFOs as a powerful force for developing the arts, screen and creative industries across Scotland, and we want to find ways to highlight good practice and to share experiences and learning throughout the network, and beyond.

We expect the relationship between Creative Scotland and the network of RFOs to be based on mutual respect, clarity of expectation, knowledge sharing and collaboration. We want to ensure that opportunities are harnessed, challenges addressed and that public resources are used wisely in support of the arts, screen and creative industries across Scotland.

To support the work of the RFOs Creative Scotland will:

- Commit to ensuring a regular and supportive dialogue throughout the funding period;
 - Develop and maintain a clear understanding of each organisation's work, business model and operating environment;
 - Respect that the responsibility for management and the delivery of plans rests firmly with the organisation and their Board (or equivalent);
 - Analyse the collective data we receive from RFOs, produce and publish informative reports, and use the information to support discussion with organisations and their Boards;
 - Advocate on behalf of the network, promoting the benefit and value it brings locally, nationally and internationally; and
 - Develop the wider operating environment for the arts, screen and creative industries by creating strategic opportunities through influencing and brokering partnerships.
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To foster productive relationships between Creative Scotland and its RFOs both parties will:

- Work diligently to deliver the Activity and Programme Plans, development goals and milestones set out in Funding Agreements;
 - Communicate in a professional, collaborative and positive way;
 - Coordinate meetings, visits and conversations that allow for the provision of accurate reports and the information specified in the Funding Agreement in a timely manner; and;
 - Discuss any emerging risks or challenges in an open and proactive way.
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Section 2:

What is expected of an RFO

In [the application guidance](#) for the RFO programme we identified the criteria for RFO funding. These are included here to underline what is expected of the organisations within the RFO network.

Vision and purpose

RFOs are expected to have a clearly defined vision and purpose that expresses why the organisation exists, what it plans to achieve and who benefits from its activity. Across the network of RFOs we fund a variety of organisations that deliver a range of artistic and creative work for, and with, people across Scotland.

Contribution to our Ambitions

RFOs are expected to make a strong contribution towards delivering the outcomes of Creative Scotland's Ambitions as set out in Creative Scotland's [10-year plan](#), with a focus on Excellence and Experimentation; and Access and Enjoying Creative Experiences. We welcome contributions to the other three Ambitions (which focus on Place; Skills and Leadership; and International) as relevant. We do not expect every RFO to deliver equally across Creative Scotland's five published ambitions.

Contribution to our Connecting Themes

RFOs are expected to embed each of the four connecting themes across their organisation and its work. These are: Equalities, Diversity and Inclusion; Creative Learning; Digital; and Environment. Organisations should clearly outline in their plans how they will deliver the outcomes set against each of the Connecting Themes.

Contribution to the development of the sector

RFOs are expected to contribute to sector developments in relevant art forms or areas of creative practice. Examples of this could include an organisation's role in delivering:

- high quality art form or creative development
- professional development programmes
- socially inclusive artistic or creative programmes
- imaginative creative learning programmes
- new collaborative business models designed to generate more efficient working methods
- innovative partnerships across the cultural, wider public, voluntary and private sectors.

Commitment to fair pay for artists, creative practitioners and staff

RFOs are expected to meet industry standard rates when paying artists and creative practitioners, and to pay a Living Wage in accordance with the Living Wage Foundation's guidance for staff employed by the organisation. For more information see our [Guidance on Industry Standards](#).

Governance, management and leadership

RFOs must be able to demonstrate effective governance and management systems in place, including appropriate financial controls and leadership. Appropriate should be interpreted as being in line with the limits set by legislation or if in the documents of the organisation's incorporation. Management structures should be clearly defined, robust and fit for purpose, including demonstrating that Board members (where applicable) and senior staff are suitably qualified and/or have appropriate experience. We expect work programmes to be clearly set out, with responsibility for each area of work identified, including delivery by any partner organisations. Potential conflicts of interest must be disclosed and carefully managed. Guidance can be found on OSCR's website www.oscr.org.uk/guidance-and-forms/guidance-and-good-practice-for-charity-trustees/conflict-of-interest or as under directors' responsibilities in the Companies House Act 2006 www.gov.uk/guidance/being-a-company-director.

Financial health

Organisations should have appropriate audit and financial controls as detailed in the section Governance, management and leadership section above. They should be able to demonstrate that they have plans in place to maintain good financial health across the funding period 2018-21 and that they will be in a position to generate and/or attract other sources of funding - as required.

Open Project Fund (OPF)

Given the very high demand on Open Project Funding we will prioritise OPF support to those individuals and organisations who do not benefit from multi-year funding.

This means that RFOs are not eligible to apply to the Open Project Fund – either as an individual organisation or within a consortium of RFO partners. An RFO can be cited as a partner in an application made by another organisation to the Open Project Fund but we will expect the applicant, and main beneficiary of the funding to be the non-RFO partner/s. In these cases the programme of work applied for, and the relationship between the RFO and the OPF applicant, will need to be described in the context of the RFO's Funding Agreement with Creative Scotland.

We appreciate the financial pressures that some RFOs are experiencing and we will review this position as part of our planned Funding Review. In the meantime, there will be no exceptions to this rule.

Touring Fund RFOs whose funding agreement includes making and touring theatre and/or dance as part of their core activity should not apply for the Touring Fund.

Section 3:

Developing our partnership

Lead Officers

Lead Officers are the primary and first point of contact between RFOs and Creative Scotland. They are responsible for supporting, monitoring and internally reporting on the work of the RFOs. Lead Officers can provide feedback and reflections on the performance of the organisation and suggest other sources of advice and support from across Creative Scotland and elsewhere. Lead Officers **do not** provide legal or financial advice and will not tell an organisation how to manage its business.

Lead Officers hold the overview of an organisation's work and each Lead Officer is part of a team supported by a relevant Head of Art Form/Specialism and a Director. Collectively they hold the strategic overview of the RFOs within their specialist area.

Within the network, there are many organisations that work across the arts, screen and creative industries. Lead Officers will act as a conduit for organisations to connect with other Creative Scotland colleagues whose expertise may be of value to their work.

RFOs can expect – as a benchmark – to have contact with their Lead Officer on at least a quarterly basis. This may include –

- a scheduled telephone conversation;
- inviting a Lead Officer to observe a Board (or equivalent) meeting;
- a meeting for a specific purpose;
- experiencing an organisation's work; and
- attending a joint meeting with other stakeholders.

The frequency of contact will be determined by the RFO, the Lead Officer and the specific needs of the organisation at any given time.

We may ask organisations to provide free tickets, programmes and catalogues to Lead Officers where necessary.

How Lead Officers will work with staff and boards within RFOs

Lead Officers will work mostly with the Chief Executive (or equivalent). Where there is a separate Chief Executive and Artistic Director/Creative Director, the Lead Officer will develop an ongoing relationship with both people to ensure a holistic view is taken across the organisation's work. Lead Officers may also communicate directly with other members of Senior Management in larger organisations.

The Board of the RFO is ultimately responsible for its performance. Lead Officers will occasionally attend Board meetings as an observer; to help them to gain a deeper insight into the issues and development of an organisation, and to see how decision-making works and the ways in which business is conducted. Lead Officers will not take part in the Board's decision making, but they may use attendance at Board meetings to provide feedback to the Board and may meet with the Chair of the Board (or equivalent) to discuss issues around the organisation's performance.

Lead Officers will maintain absolute discretion in managing their relationship with a RFO, and respect the duty of confidentiality they hold in relation to any documents or information they are given as part of their role. They will not place any information in the public domain without the express permission of the RFO, and they will ensure that any information they hold on file is accurate and up to date.

We require RFOs to provide Lead Officers with a copy of all papers as they are submitted to their Board. We will accept activity and financial reports submitted to, and approved by, the Board as accurate progress updates and keep them on file.

Contributing to the recruitment process for senior appointments

The recruitment and selection process for senior appointments is the responsibility of the RFO. However, Creative Scotland reserves the right to be involved in the appointment process for any senior staff positions. This is to ensure there are robust and transparent recruitment processes in place for senior leaders across the RFO network. Involvement in the recruitment process may vary from commenting on job descriptions through to attending interview panels. Lead Officers would contribute information and comments to support the organisation's decision making but would not take part in the decision itself and may act as an observer in any interview.

Management and governance

We place a strong emphasis on the management and governance of organisations in the RFO network. Good governance is fundamental to enabling organisations to thrive in these increasingly challenging times. As part of our relationship with the RFOs we will consider the following points:

- The organisation's ability to plan and manage its programme of activity so that work is delivered on time, within budget and to an appropriate level of quality;
- The organisation's awareness of risk, and evidence that it can manage key risks appropriately;
- The ways in which the organisation manages and monitors its budgets and cashflows, ensuring all staff are paid appropriately, necessary costs are covered and all income and expenditure is properly accounted for;
- The range of skills and abilities of the Executive, Trustees and Board Members, and the ways in which these are used to support the organisation's work;
- The timeliness and effectiveness of the reporting arrangements between the Executive and Trustees, as well as the management of all formal reporting necessary to meet legal requirements;
- The organisation's ability to collaborate and work in partnership with a range of individuals and organisations;
- The effectiveness of project and programme evaluation/reporting methods, and the ways in which this evidence is used to inform future work; and,
- The ways in which the organisation seeks to strengthen and grow opportunities for income generation.
- The disclosure and management of any potential conflicts of interest.

Lead Officers will discuss these points as part of their regular conversations with an RFO and they will be used to inform the organisation's annual Risk Assessment.

We have developed an online resource for organisations to provide informed and up to date reference sources advising on various aspects of governance. Information can be accessed here:

www.creativescotland.com/resources/professional-resources/guidance-and-toolkits/governance-in-the-arts-and-creative-industries

If your organisation is experiencing difficulties

We appreciate how challenging the operating environment is for cultural and creative organisations and understand that some organisations may experience difficulties during the funding period because of financial pressures, changes in leadership or other factors. We will look at the individual circumstances to see where we can offer the best advice, guidance and/or support.

In the event of an organisation facing significant difficulties, or where we consider that an organisation is not delivering what was agreed in the Funding Agreement, we will expect the organisation to take responsibility for the situation. Accountability for the organisation rests solely with the Board (or equivalent). We will expect to see strong leadership and a plan from the organisation as to how to manage the situation.

Creative Scotland will aim to be supportive of the organisation, and we may alter expectations while organisations restructure, temporarily advance grant payments or agree to vary agreed milestones or other aspects of the Funding Agreement.

If we have concerns

Creative Scotland has a duty to ensure the appropriate use of the public funds we award. If we are concerned with an organisation's progress our first step will be to give feedback and then discuss this with the organisation so we can better understand what the issues might be. We expect the Board (or equivalent) to be aware of our concerns. We may also choose to make one or more of the interventions set out below.

- **Action plans** - We may ask for and agree an action plan for improvement in response to concerns. Organisations will be responsible for this plan and we will monitor its effect.
- **Increased reporting** - We may ask for reports in writing more frequently on certain issues or confirm that areas of concern that we identified are being addressed.
- **Right to audit** - We reserve the right to audit the financial information of an organisation.
- **Funding conditions** - We may place additional conditions on our grant payments to ensure compliance when existing conditions or standard requirements have not been met.
- **Consultants** - We may ask individual consultants to provide us with detailed information about the work or an organisation. We may commission the consultant jointly with the organisation or ask for them to report exclusively to us depending on the circumstances.
- **Stakeholder review** - We may seek to hold a joint review meeting with other funding partners and discuss areas of mutual interest for improvement or development.
- **Withholding payment** - If the conditions of our funding have not been met we may decide to withhold payment of a grant until conditions are fulfilled.
- **Withdrawing funding** - In extreme circumstances we may decide to cease funding and in cases where there has been a breach of the terms and conditions we may ask for repayment.

Section 4:

Planning and Reporting

Your Funding Agreement

Our formal contractual relationship with each RFO is set down in a Funding Agreement that details the activities the organisation has agreed to deliver with the funds provided by Creative Scotland. The Funding Agreement contains the specific monitoring and reporting requirements that the organisation will have to fulfil as a condition of the grant it receives. Funding Agreements were issued at the end of May in year 1 (2018). In years 2 and 3 Funding Agreements will be issued March.

Following Year 1 the templates for the Activity and Programme Plans and Budgets will be sent to RFOs in December. Lead Officers will work with RFOs throughout January and February to finalise these documents so that Funding Agreements can be issued ahead of the new financial year.

Activity and Programme Plan

The Activity and Programme Plan should reflect the organisation's key activities in the context of Creative Scotland's ambitions, priorities and connecting themes with any identified development goals over the short, medium and long term.

We will provide templates to enable RFOs to outline their planned activities, what the goals are for this work, and the milestones that will be used to record progress against these goals. The templates will be used as the basis of discussions with Lead Officers and will be used to support the Annual Review process.

Finance

We will provide a Financial Pro Forma to enable RFOs to detail their projected annual income and expenditure, including the funds made available by Creative Scotland, alongside a 12 month cashflow. We realise that some financial information may need to be provided in draft form, subject to Board approval, or pending the outcome of final funding decisions from elsewhere. Organisations should submit their financial information in as full and confirmed a form as possible. Where there are changes to the information after submission, the Lead Officer should be advised immediately.

Developmental goals and milestones

Funding Agreements detail the agreed goals and milestones that the organisation is seeking to achieve within each specific funding year. The goals should be measurable, ambitious and achievable within the timespan of each 12 month Funding Agreement. In most instances, we would expect goals to change or develop for each year covered by the Funding Agreement, although some may extend across more than one year.

The nature and number of goals will vary across RFOs but in broad terms we could expect:

- At least one goal to be directly linked with artistic and creative activity, e.g. 'Produce and tour (x) new productions, visiting at least (x) venues across Scotland, with (x) performances, screenings or exhibitions', or 'support (x) artists, creative practitioners or filmmakers through their professional development, offering them (x) hours of mentoring, (x) hours of workshop space, and (x) hours of administrative support'.
- At least one goal to be linked to reaching and developing audiences and participants, e.g. 'We will reach at least (x) people as attendees and participants (live and/or online)'; 'We will increase the return rate of audiences by (x)'; 'We will develop a deeper understanding of the art form by our audiences and/or participants'.
- At least one goal to be directly related to longer-term development, e.g. 'Identify and negotiate connections with at least (x) new partners interested in collaborating with us to produce or support future work', or 'Develop our website by (x date), to provide better access to our work'.
- At least one goal to be directly linked with the organisation's Equalities, Diversity and Inclusion Action Plan, e.g. 'We will work with our marketing team towards developing (x) new audience members from (x locale or x diverse background)' or 'We will ensure that at least (x%) of our programme comprises work created and/or performed by diverse artists.'
- At least one goal to be directly linked with the Financial Plan, e.g. 'we will strengthen our income generation, and ensure the proportion of Creative Scotland Regular Funding does not exceed (x%) of our annual turnover'.
- At least one goal to be directly linked to strengthening governance and/or management, e.g. 'We will undertake an open recruitment process for (x) new Trustees to be appointed in this financial year, bringing with them skills in (x)' or 'We will strengthen our approach to freelance contracts to provide better working conditions for artists'.
- A least one goal should be directly linked to improving the organisation's environmental footprint, e.g. 'We will develop and adopt an environmental friendly travel policy'. As a minimum your revised Carbon Management Plan should be submitted.

Each goal should have a series of milestones which break the goal down into smaller targets to be met across the year.

These goals and milestones will help the organisation and the Lead Officer to monitor the organisation's progress with regard to delivering its programme of work and meeting the ambitions and connecting themes identified in the Creative Scotland [10 year plan](#).

Equalities, Diversity and Inclusion Action Plans

Creative Scotland is subject to the Equality Act 2010 and the Public Sector Equality Duty (PSED). In that context, we require each RFO to produce and implement a clear Equalities, Diversity and Inclusion Action Plan. The plan should consider equalities, diversity and inclusion across all activities including governance, employment, programming, marketing, audience development and community engagement.

Each RFO was required to submit an overarching Equality, Diversity and Inclusion Action Plan for the duration of their funding agreement 2018-2021. A more detailed action plan for each of the three financial years should provide a clear working document which outlines objectives, tasks and a timeline for each financial year, as well as details of how progress will be monitored and evaluated.

Your lead officer will regularly discuss progress against agreed objectives and actions within the plan as part of the ongoing RFO monitoring cycle and will also consider the impact of these plans as part of the Annual Review process.

We will support organisations to develop Equality, Diversity and Inclusion Action Plans, providing advice, guidance and signposting. A toolkit for EDI Action planning is available on the [Creative Scotland website](#).

The updated EDI Action Plan for 2020/21 should be submitted in January 2020 alongside the RFO's Financial and Activity Plans for the same period.

Carbon Emissions and planning

As part of the funding agreement RFOs need to report on 2018/19 carbon emissions. In previous years a reporting template was included in the Annual Statistical Survey issued by Creative Scotland. In 2019 the reporting process will be managed by Creative Carbon Scotland who will advise and support RFOs on the requirement over the course of Q1 and 2.

RFOs were asked to provide an update on the Carbon Management Plan submitted to Creative Carbon Scotland in 2018.

Annual Review Report

Each RFO will be asked to provide their Lead Officer with a written Annual Review Report in early November in each of the years covered by their Funding Agreement. While there is a template for the report, the organisation is encouraged to use its own voice to reflect on: how well the programme of work is being delivered; where there are examples of good working practices that could be shared with the rest of the sector; if there are any emerging risks to their Activity and Programme Plans and if there will be a shift in focus in future years; how well the organisation is performing in terms of its financial management and governance; and how well the relationship with Creative Scotland is working. Organisations will be asked to produce a Risk Assessment as part of this Report for discussion at their Annual Review Meeting.

The Annual Review Report must be provided to the Lead Officer to enable the Annual Review Meeting to be conducted fairly and productively.

Annual Review meetings

Lead Officers will conduct formal Annual Review meetings with RFOs in **November/December** of each financial year covered by the Funding Agreement. These meetings will be an opportunity for Lead Officers and RFOs to discuss progress in relation to the agreed goals and milestones, and to consider revised Activity and Financial plans for the coming financial year.

The Annual Review meeting will be attended by the Lead Officer who may be joined by other Creative Scotland staff, such as the relevant Head of Art Form/Specialism lead and/or Director. We would expect the Executive and Creative leaders of the RFO to attend the meeting. The Chair of the Board may also wish to attend. The Lead Officer and RFO will jointly agree attendees, and ensure they are provided with copies of the relevant documents in advance.

The Annual Review meetings will use the Annual Review Report and approved Activity and Financial plans to inform the discussion. Other documents and information which have been collected over the year, may also be referred to.

Annual Feedback Letter

Following the Annual Review Meeting, Lead Officers will provide written feedback to RFOs in the form of an Annual Feedback Letter and Risk Assessment. This will be provided no later than **four working weeks after** the Annual Review meeting. It will be based on the Annual Review Report provided by the RFO and the subsequent Annual Review meeting, and will take into account any other conversations, documents and information gathered over the year.

The Feedback Letter will set out:

- How well we consider the RFO is making progress in terms of achieving our Ambitions and Connecting Themes;
- The progress the RFO is making against its agreed development goals and milestones; and,
- An assessment of the level of risk associated with the delivery of the agreed plans.

We will also use the Annual Feedback Letter to highlight where we believe there is good practice and to encourage organisations to share such practice with peers and the sector more generally.

We expect the Feedback Letter itself along with the context of the content to be shared and discussed with the RFO's Board.

How we will assess risk

We anticipate that RFOs will take risks in pursuit of their goals. It is important for us to maintain a balance between risk-taking and safe-guarding the public funds that we distribute. We will use our various interactions with an organisation to identify the level of risk associated with the successful delivery of an RFO's plans and, subsequently, to Creative Scotland's funding.

We will use input from Lead Officers and the documentary material provided by the RFO and Creative Scotland staff to review delivery against:

- **Activity and programme plan** - Are goals being achieved? Is the work of a high quality? Is public engagement in line with the agreed plan? Is the organisation taking measures to realise its ambitions in terms of Creative Scotland's four connecting themes? etc.
- **Finance, Management and Governance** - Does the organisation produce accurate financial information on a regular basis? Is planned income being realised? Is there an appropriate risk assessment process in place? Does the organisation have appropriate governance and management structures in place and do they work effectively?
- **Equalities, Diversity and Inclusion Action Plan** - Has the organisation identified and evidenced their EDI objectives and priorities? Does the organisation's EDI Action Plan include clear accountability lines, resources to deliver the plan and a realistic timetable? Is there appropriate provision for the collection of EDI related information? etc.
- **Emissions and Carbon Management** - Are adequate measures being taken to reduce the organisations carbon footprint? Have the actions identified in the plan been delivered? Are there appropriate measures in place to deliver the plan to a realistic timetable?

We will reach a conclusion about the level of risk for each organisation based on these various factors. We will record our assessment of an organisation's level of risk in their Annual Feedback Letter, based on the levels set out below:

High Risk	Immediate feedback, intervention as necessary
Medium Risk	Feedback as necessary, increased monitoring
Low Risk	Annual feedback, quarterly monitoring

We expect most organisations to be medium to low risk. We use the risk level to determine whether any change in our relationship or further intervention is required. Lead Officers' time will be prioritised towards monitoring RFOs that we consider to be higher risk.

Annual Statistical Survey and data capture

In order to meet reporting requirements set by Scottish Government, each RFO is required to complete an Annual Statistical Survey to provide data on their activity. Creative Scotland send a standard template to organisations in August each year. This must be completed and returned to Creative Scotland by the end of September each year. As the survey is retrospective, returns submitted in September 2019 should cover the period 1 April 2018 to 31 March 2019. We use the data to help us understand and report on the impact of our funding across the RFO network and it is important for us to receive the Annual Statistical Survey on time to ensure we can keep to our agreed reporting cycle.

As communicated to RFOs in June 2019, Creative Scotland is now working with The Audience Agency (TAA) to introduce a system of standardised audience data collection and analysis for organisations working in the Arts, Screen and Creative Industries in Scotland. This work aims to support audience development to assist organisations with their business, programming and marketing decisions. TAA will host sessions to introduce RFOs to the Audience Finder tool, which is now live for RFOs to use. An opt-in Stakeholder Steering Group will be established allowing a bespoke Audience Finder Scotland to be developed in close consultation with Scottish organisations. If you have any queries about this work please contact Alastair Evans alastair.evans@creativescotland.com.

In time, we expect that reporting through TAA's Audience Finder tool will replace audience reporting through the Annual Statistical Survey. The audience section should, however, still be completed for the survey due in September 2019.

Please note that in 2019 we will not be requesting environmental reporting through the Annual Statistical Survey. The process will be managed by Creative Carbon Scotland who will advise and support RFOs on the requirement over the course of Q1 and 2. This year we have included a small number of questions about organisations' buildings and tenure arrangements, to support a national research study on Capital investment in Culture.

Why creativity matters – sharing your stories

Creative Scotland manages several communications channels that can be accessed by RFOs to share their work with as broad an audience as possible. Our digital communications channels should be seen as platforms for any organisation to use to complement its own promotional work. We very much want our website to be a shared space for the organisations and individuals that we support to showcase their work and to connect with others across the arts, screen and creative industries. We will also offer advice and support for media relations, marketing, events and Government relations communications work.

To learn more about what we can do for you in terms of communications support, please contact:

Ken Miller Director of Communications
m: 07970 557 960
e: ken.miller@creativescotland.com

Freedom of Information Act

The Freedom of Information (Scotland) Act 2002 was designed to promote a culture of openness and accountability amongst public sector bodies by providing people with access to the information held by them.

Any information can be requested under the Act. It's important to mention that exemptions can apply, but we will only use these where it's unavoidable. An example of this might be where information is of a commercially sensitive nature.

If we receive requests from members of the public for access to information which we hold on a RFO, we would inform the organisation prior to releasing any material.

Creative Scotland has adopted the Scottish Information Commissioners Model Publication Scheme and has produced and published our [Guide to Publication Scheme 2015-19](#) which details the information we make available in each of the Classes identified. Creative Scotland inherits the information of the two predecessor organisations and their information has been incorporated into this Guide.

If organisations have a complaint

If organisations wish to complain about any aspect of their relationship with Creative Scotland or its staff, they are able to follow our Complaints Handling policy, which is published on our website [here](#). They should write first to their Lead Officer, or if this is not appropriate, they can write instead to our Director of Communications.

Data Protection - how we handle RFO personal information

Details of how Creative Scotland handles and uses RFOs' personal information is contained within our [Funding Privacy Notice](#) available on our website.

Section 5:

Timeline and key dates:

Between April – June:

- RFO to contact Lead Officer on a quarterly basis – either via a scheduled telephone conversation; inviting the Lead Officer to observe a Board (or equivalent) meeting; a meeting for a specific purpose; an invitation to the Lead Officer to experience an organisation's work; to attend a joint meeting with other stakeholders; or via scheduled and regular visits to the organisation.
- RFO to supply Board papers and other relevant material to the Lead Officer on a quarterly basis.
- Funding Agreement – with Activity and Programme Plans, Finance Plans, goals and milestones for the year – to be signed/agreed by end of May in Year 1, and by end of March in Years 2 and 3. The plans are to follow the templates that will have been provided in the preceding December.
- 1st quarterly RFO payment issued by Creative Scotland in mid April. In Year 1, to assist with cashflow, the 2nd quarterly payment will be issued in June (in Years 2 and 3, the 2nd quarter payment will be made in July).
- Three year EDI Action Plan and annual plan for 2019-20 to be final and approved by 28 June 2019.





Between July – September:

- RFO to contact Lead Officer on a quarterly basis.
- RFO to supply Board papers and other relevant material to the Lead Officer on a quarterly basis.
- In Years 2 and 3, the 2nd quarterly RFO payment issued by Creative Scotland in early July.
- Creative Scotland to issue Annual Review Report letter and template in September to provide information ahead of the submission deadline in late October.
- RFO to supply Annual Review Report in October
- Annual Statistical Survey to be issued by Creative Scotland in August.
- RFO to complete Annual Statistical Survey by the end of September. Please note, in year 1 this only applies to organisations who were part of the RFO Network 2015-18. Organisations new to the network for 2018-21, will not be expected to submit a return until September 2019 – covering the period 1 April 2018 to 31 March 2019.
- Carbon Emissions Report and update on Carbon Management Plan to be provided to Creative Carbon Scotland by 27 September 2019



Between October – December:

- RFO to contact Lead Officer on a quarterly basis.
- RFO to supply Board papers and other relevant material to the Lead Officer on a quarterly basis.
- 3rd quarterly RFO payment issued by Creative Scotland in early October.
- Creative Scotland to issue Annual Review Report template in September for return in October.
- RFO and Lead Officer to hold Annual Review Meeting annually (in November or December). If the Annual Review Meeting takes place in November, the feedback letter will be issued in December. If the Annual Review meeting takes place in December, the feedback letter will be issued in January.
- Creative Scotland to issue template documents for following year's Activity and Programme Plans, Finance Plans for following year in December.





Between January - March:

- RFO to contact Lead Officer on a quarterly basis.
- 4th quarterly RFO payment issued by Creative Scotland in early January.
- For those RFOs whose Annual Review meeting took place in December, the Feedback Letter will be issued by Creative Scotland in January.
- Creative Scotland Lead Officers to work with RFOs throughout January and February to finalise Activity and Programme Plans, Finance and EDI Action Plans for year ahead.
- Creative Scotland issues RFO Funding Agreement for coming financial year. RFO signs and returns Funding Agreement by end March.



Throughout:

- Creative Scotland's communications channels remain available to use.
- Creative Scotland can assist with senior level appointments.
- Creative Scotland to provide support and updates for reporting and planning activities.