UK Theatre Business Plan

2017-21
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1. UK Theatre’s vision and approach
1. UK Theatre’s vision and approach

UK Theatre is the UK’s leading professional membership organisation for theatre and the performing arts.

**UK THEATRE’S VISION IS TO SEE**

a well-connected and well-supported theatre sector that is recognised as being at the heart of UK life, with thriving organisations, the world’s greatest creative and managerial talent and ever larger and more diverse audiences.

Over the last few years UK Theatre has been working to realise this vision. In 2014 we transformed from the Theatrical Management Association into UK Theatre – a more modern profile that we believe better reflects the industry we serve.

We improved the range of membership opportunities available, opening our support to any professional working in the theatre and performing arts industry.

UK Theatre was at the forefront of initiatives that improved the working environment for theatres across the country and, from the introduction of the Theatre Tax Relief to the first ever Venue Ticket Sales Benchmarking report, we successfully negotiated the changing landscape and needs of the industry and government.

UK Theatre’s Business Plan for 2017-21 reflects a changed and dynamic environment. Theatre and the performing arts continue to attract audiences. In 2016 we saw, again, a welcome increase in both ticket sales and income. Our industry is a vital part of the creative industries - one of the fastest growing areas of the economy. And we can play an important role in helping our society to navigate new territory as Britain prepares to leave the European Union.

We know that over the next few years we’ll continue to face considerable funding challenges, particularly at the local level. We know that our stages and workforce must become more diverse if we’re to become an industry that truly celebrates, reflects and explores who we are as a society. And we’ll continue to see changes in audiences’ expectations of theatre; from a rise in non-traditional venues to the opportunities and challenges of the digital world.

It’s vital that in these times UK Theatre supports our industry to be innovative and resourceful, and to become more resilient and relevant than ever before. From 2017-21 we will support our members to make sure that audiences across the UK can experience wonderful theatre and performing arts for many years to come.

Over the course of this five year business plan UK Theatre will aim to be:

- **Relevant**: our work will help to keep theatre and the performing arts relevant to society and audiences, and UK Theatre’s offer relevant to this achieving this.

- **Resilient**: our work will have an influence on improving the resilience of the sector.

- **Proactive and innovative** in our approach to achieving this.

We will adopt these guiding principles for the way we operate in order to achieve our aims:

- We will champion and support theatre and performing arts across the country, celebrating and supporting success.

- UK Theatre is by the sector, for the sector. Our members’ experience and knowledge helps us to provide practical support and solutions.

- We will work with the Society of London Theatre (SOLT) to support the whole of the theatre and performing arts sector, funded and commercial.

- We will work in partnership, for example with the Independent Theatre Council, London Theatre Consortium, Federation of Scottish Theatre, Theatre NI, Creu Cymru, Association of British Orchestras, One Dance UK, and the Creative Industries Federation.

From 2017-2021 the core professional services that UK Theatre provides to the industry will remain as:

- Advocacy, thought and sector leadership.

- Expert advice, negotiation and contracts with industry unions.

- Expert legal advice.

- Conferences, courses, events and networking opportunities.

- Research and industry insight, leading to resources, guidance and best practice.
2. Goals and Objectives

OUR GOALS FOR 2017-21
2. Goals and Objectives

Our goals for 2017-21 are in two areas

RESPONDING TO THE EXTERNAL ENVIRONMENT: SUPPORT FOR THEATRE AND PERFORMING ARTS

- Future of the theatre and performing arts workforce.
- Diversity of theatre and the performing arts.
- Support funding and income generation.
- Support digital developments and changes to working practices.
- Support the health of touring and the regional producing and presenting model.

DEVELOPING OUR SERVICES TO MEMBERS

- Ensure UK Theatre’s membership model is fit for purpose.
- Modernise the sector’s approach to Employment Relations.
- Legal Service.
- Buildings, technical and security.
- Research and analysis to drive the resilience of the sector.
- Celebrate excellence through the UK Theatre Awards.
- Training and events.
- Advocacy, thought and sector leadership.

The two areas are linked; in order to achieve the change we want to see in the theatre and performing arts industry it’s vital that our services to members remain relevant of a high quality and are relevant to our sector.

In many cases our objectives will meet more than one goal, and we’ll be clear when this is the case.

In each goal section we are both building on existing and successful work, and we will trial new ways to support the sector.

In a sector as dynamic and changing as ours it is likely that new issues will emerge, so our plans will need to adapt to the landscape. Our objectives to reach these goals will be reviewed and revisited each year.
Responding to the external environment: support for theatre and performing arts

**Goal**

THE FUTURE OF THE THEATRE AND PERFORMING ARTS WORKFORCE

The UK’s creative industries are growing at almost twice the rate of the wider UK economy, and are worth £87.4 billion a year. There are now 1.9 million jobs across the creative industries, and since 2011 this figure has risen by nearly 20 per cent.

We know that our industry is dynamic and changing, and that we need to invest in our workforce now if we are to have the right skills and expertise in place for our industry to thrive ten or twenty years from now.

UK Theatre and Society of London Theatre (SOLT) have commissioned Nordicity (a specialist creative industries research consultancy), working with Alistair Smith (Editor of The Stage) to carry out a major research project into the current and future training needs of the UK’s world leading theatre and performing arts sector.

It will identify gaps in training and development for off-stage roles, including theatre management and technical skills, and the need for skills in new technologies. It will cover the range of career progression, from entry level, apprenticeships, mid-career development, to the needs of the sector’s future leaders.

It will also look at how entry and development routes for people from black and minority ethnic groups, for disabled people and for those from low socio-economic backgrounds can be improved, with a view to increasing diversity across the workforce.

The research will help UK Theatre and SOLT work with government (local and national) and employers, and on behalf of the industry, to keep the sector resilient and relevant into the future.

The report will be published in mid 2017, and specific objectives to deliver the recommendations of the research will be set at that point.

**We will...**

- Establish a programme of work to address the recommendations of the research, to be delivered throughout the course of this business plan.

- Review and develop the UK Theatre training and events and conference programme to ensure it is relevant and useful. Developments may include:
  - Grow the UK Theatre mentoring programme.
  - Establish a leadership development course.
  - Enable skills sharing across the sector.
  - Establish member networks to support specific needs, for example capital projects or education.

**Measures of success**

- Indicators will be developed following the delivery of the research and recommendations. They will be based on a range of factors, from the satisfaction rates and delegate numbers for UK Theatre’s training and events programme to the progress of our work with Government and the industry.
Goal

IMPROVE THE DIVERSITY OF THEATRE AND THE PERFORMING ARTS

From 2017-21 work to improve the diversity of theatre and the performing arts will be a significant priority for UK Theatre and our members. The case for doing so is clear; for theatre and the performing arts continue to contribute to the UK’s world-leading creative industries they must draw on the talent base, and build audiences, from all areas of society.

The results of our 2016 member survey showed that UK Theatre members want to see a career in theatre become more accessible to young people from all areas of society. If the sector is to continue to thrive it is vital that its workforce becomes more representative of our society and includes more people from BAME backgrounds, who are disabled, and from low socio-economic backgrounds.

Over the coming years UK Theatre will make and support positive, practical interventions to improve the diversity of the theatre and performing arts workforce. We will lead in the delivery of practical tools and guidance to help create the best possible conditions for change to take place, and we will build partnerships with those whose knowledge and experience is enabling good practice to develop.

UK Theatre believes that diversity is key to ensuring resilience in the sector. We will ensure that UK Theatre is a core part of all discussions about how to drive this agenda forwards.

We will...

• Following the publication of the UK Theatre and SOLT workforce research, develop specific objectives to enable a career in theatre and the performing arts to become more accessible to young people from all areas of society, to improve the diversity of the theatre and performing arts workforce.

• With Tonic Theatre, Equity and stakeholders from across theatre and the performing arts, publish a planning tool to encourage the casting process to become more open and our stages to be more representative of society.

• Support the sector to achieve best practice in access for audiences, and work with partners to promote the production and availability of accessible performances.

• Establish a Board Bank of professionals within and related to our sector who are BAME, disabled, and from low socio-economic backgrounds to assist theatre and performing arts organisations in addressing the diversity of their Boards.

• Support Parents in Performing Arts (PIPA), a campaign to find and establish long term, creative strategies to increase access to work for people with caring commitments.

Measures of success

• Positive evaluation of the pilot stage of the diversity casting planning tool.

• Usage of the diversity casting planning tool, and future diversity planning materials.

• Take up and satisfaction ratings for access guidance.

• Successful development and usage of the Board Bank.

• Successful development of Parents in Performing Arts guidance.
### Goal

**SUPPORT FUNDING AND INCOME GENERATION**

In a challenging environment for public funding and, particularly while the economic impact of leaving the EU is unknown, funding and income generation remains the single biggest challenge on the horizon for theatre and the performing arts.

From 2017 to 2021 UK Theatre will continue to champion both national and local funding for our members, and for arts and culture overall. We will also the support the theatre and performing arts sector to address changes to their traditional funding models, and to become more aware of and able to exploit new and innovative ways to generate income.

**We will...**

- Produce a package of resources to help members to access new sources of funding and understand new models of working.
- Support an advocacy campaign to promote the value and importance of Local Authority support for the arts, working with the National Campaign for the Arts and the What Next? movement.
- Ensure that the UK Theatre programme of training and events showcases new thinking and provides opportunities for learning.

**Measures of success**

- Successful development and usage of guidance and resources.
- Awareness and engagement amongst Local Authority stakeholders of the local authority advocacy campaign.
- Satisfaction rates and feedback for relevant UK Theatre courses and conferences.

### Goal

**SUPPORT DIGITAL DEVELOPMENTS AND CHANGES TO WORKING PRACTICES**

In 2016 UK Theatre and SOLT, working with Arts Council England, commissioned research to explore what impact live-to-digital is having on theatre and what opportunities live-to-digital may offer for developing new audiences.

Using the insight from this research we will deliver work that will help ensure the sector is better informed and more able to address the opportunities and challenges of the live to digital market.

We will also explore other ways to support members to make more digital content and to reach broader, younger and more diverse audiences. As well as live to digital this will include ‘born digital’ work, where digital technology and media is embedded in the creation of the work. We will also work on negotiating rights and pay scales for digital activity.

**We will...**

- Produce guidance for those who are looking how to develop and distribute digital content, including the sign-posting of existing opportunities for live-to-digital capacity-building.
- Lead on encouraging better coordination among those programming and producing live performance and those producers, distributors and exhibitors scheduling Event Cinema programming in the same catchment.
- Negotiate a standard agreement for digital rights, pay scales and royalty fees in collaboration with Equity and working closely with publishing houses, trade bodies, collection agencies and agents.
- Scope further research to consider live-to-digital’s impact on the theatre and performing arts sector over time, and to identify emerging trends.
- Monitor the finding that streaming attracts younger and more diverse audiences, and understand how this knowledge can be put to good advantage.
- Define our support for the creation of digital content – for example negotiating rights and pay scales for digital activity.

**Measures of success**

- Successful development and usage of guidance and resources.
- Feedback indicates that theatre and event cinema stakeholders are more coordinated.
- Successful development and usage of a standard agreement for rights, pay scales and royalties.
- Clearly defined plan for further research.
- Clearly defined actions to develop the link between streaming and new audiences.
Goal
SUPPORT THE HEALTH OF TOURING

The touring, producing and presenting ecology is going through considerable change. Theatres are presenting a more mixed programme of produced and received work, there is more emphasis on co-productions, and funded companies are becoming more commercial and entrepreneurial.

UK Theatre will support the long term resilience of touring (particularly at the small to mid-scale), and support the health of the producing and presenting model for the long term benefit of audiences.

UK Theatre will work with Arts Council England (following their report ‘Theatre in England, 2016’) and with Arts Council Wales and Creative Scotland, to support producing theatres, presenting venues and producers to work effectively together, and to increase the availability of high quality work for audiences to see.

We will…

• Work with a wide range of industry leaders to establish how UK Theatre can improve the landscape for touring, presenting and producing. This could include:
  – Work with sector stakeholders, including the Arts Councils, to develop financial models to support commercial tours of publicly funded work.
  – The renewal and re-promotion of the touring code of practice and the code of conduct.
  – Production of case studies and guidance on best practice in co-productions offering guidance on key issues.
  – Use of sales and audience data to provide insights on trends and developments in touring.
  – The annual delivery of the Touring Symposium.

Measures of success

• With industry leaders and the Arts Councils, development of actions to support new financial models and best practice within touring.
• Development and usage of guidance materials.
• Delivery and satisfaction ratings for research and analysis to monitor developments in touring.
• Delegate numbers, make up of delegates and and satisfaction ratings for the Touring Symposium.

Developing our services to members

Goal
ENSURE UK THEATRE MEMBERSHIP IS FIT FOR PURPOSE

The health of the UK Theatre membership model is vital to our success, and to our relevance with the sector. We will continue to monitor and improve our offer to members and take a long term approach to membership development. We will act to ensure that the membership of UK Theatre, and the membership of the UK Theatre Board, is more diverse in terms of skills, geography, race/ethnicity, disability, and socio-economic background.

We will…

• Monitor and improve the offer to all members, with a particular focus on Local Authority funded members, Concert Halls and members in the UK nations.
• Become more entrepreneurial in identifying benefits and offers for all members.
• Review and improve the new Professional Membership category.
• Actively engage with individuals across the sector to improve the skills, geographic, race/ethnicity, disability, and socio-economic diversity of the UK Theatre membership and Board.
• Explore the potential to introduce student membership.
• From 2018, review and potentially revise membership fees.

Measures of success

• Membership numbers and satisfaction ratings – overall and in all categories.
• Improved levels of diversity within the UK Theatre membership, and on the UK Theatre Board.
Goal

MODERNISE THE SECTOR’S APPROACH TO EMPLOYMENT RELATIONS

UK Theatre’s negotiation with recognised unions and its provision of contracts and employment relations advice is at the core of our offer to members. It is one of the most valued areas of our professional services, with 74% of respondents to our member survey saying they were either ‘satisfied’ or ‘very satisfied’.

The Employment Relations team give advice across a wide range of issues - including pay and pensions, holidays and absence, hours of work, expenses and UK and overseas touring.

As part of its new approach to Employment Relations the team has begun a process of revising the Agreements and practices and processes of engagement with the trade unions to better reflect developing needs and requirements of theatre and the performing arts.

We will…

• Modernise the national agreements; securing commonality of core conditions of employment based on good employment standards, which are clearly set out, easy to understand and administer.

• Continue to reposition our relationship with the unions to facilitate a clearer, more purposeful and commercially focused approach. This will achieve a material change in the efficiency of the processes of engagement and improved benefit and value from the relationship.

• Be responsive to emerging developments in Employment Relations and identify areas where change may be needed and how it can be achieved.

• Further develop the strategic dialogue with the trade unions beyond collective bargaining, taking account of the industry and economic context.

• Complementary to the strategic dialogue process engage with respective trade unions individually to seek to encourage and develop their trust and support in the process of change.

• Work closely with sector bodies and the disabled membership of UK Theatre to ensure that the impact of the changes to Access to Work and the Independent Living Allowance are recognised.

• Commence the modernisation process of the Agreements by revising the existing layout and construction of the collective agreements, seeking to improve clarity and ease of understanding. Whilst the existing terms will remain in the short to medium term these initial changes will make those terms easier to understand and will also facilitate the adoption of common core conditions.

Measures of success

• Usage and satisfaction ratings for the Employment Relations service.

• Feedback indicates that agreements are clear and simpler to administer.

• Dialogue with all unions is perceived (by all parties) to be streamlined, and both strategic and supportive in tone.
Goal

LEGAL SERVICE

UK Theatre’s legal advice is one of the most valued areas of our professional services, with 68% of members saying that they are either ‘satisfied’ or ‘very satisfied’.

The Legal Team provides one to one advice to Organisation Members across a wide range of subjects, from the display of ticket prices and booking fees to the calculation of holiday pay to child licensing. We will maintain the high quality of this essential service. Over the course of this business plan we will also continue to monitor usage and satisfaction and will consider expanding the service if this becomes appropriate (and subject to available resources).

Through its monitoring of the external environment the Legal Team plays a strategic role, anticipating issues that may impact the theatre and performing arts sector and offering advice to organisations to enable them to remain resilient. The implications of the UK leaving the EU are likely to be a key area of focus over the next few years, as well as legal issues arising from the business plan objectives. In addition to the issues routinely covered by the service, we will seek to support members on these and relevant issues which may emerge, providing indispensable advice and guidance to help them to address the changing landscape for theatre and the performing arts.

We will...

• Maintain the quality of the legal service.
• Advise and support on legal issues arising from the UK Theatre business plan objectives as required.

Measures of success

• Usage and satisfaction ratings for the Legal service.

Goal

BUILDINGS, TECHNICAL AND SECURITY

We will use our new in-house expertise to advise on risk, safety & technical issues and support the long term resilience and security of buildings.

Our newly created role of Head of Risk & Technical will provide a professional and effective industry voice for the UK Theatre Membership. They will identify and evaluate emerging industry risks and develop best practice industry guidance with key partners including the Association of British Theatre Technicians (ABTT) and Health and Safety Executive (HSE).

UK Theatre also continue to play an active role at the industry Theatre Safety Committee (TSC) and the re-launched SOLT/UKT Technical Committee (SUTC). We will recognise the key threats facing the theatre industry and give direction in the development of policies, code of practice and procedures across all theatre activities.

We will also support members to be aware of guidance and resources to ensure their environmental sustainability.

We will...

• Head of Risk and Technical to develop security best practice guidance and briefings.
• Develop and deliver a new conference focusing on backstage, technical and security.
• Continued work with the National Counter Terrorism and Security office.
• Develop occupational health related initiatives and training.
• Working with Julie’s Bicycle and others, provide resources and guidance to ensure environmental sustainability.
• UK Theatre/SOLT will also develop its own statement on environmental sustainability.

Measures of success

• Successful development and usage of best practice guidance.
• Delegate numbers and satisfaction rating for the new backstage conference and any new training courses.
Goal

DEVISE AND DELIVER RESEARCH AND ANALYSIS TO DRIVE THE RESILIENCE OF THE SECTOR

UK Theatre will continue to explore how sales, audience and other organisational data can be used intelligently to drive the resilience of the sector, build audiences and support advocacy.

We will develop the venue box office sales collection and analysis to ensure that the process is streamlined and the analysis more useful. We will also explore how else the data could support resilience, for example to understand the touring model more clearly.

Our support for data sharing initiatives to build audiences for theatre and the performing arts will continue.

We will also commission and conduct research that helps us to develop policy in our priority areas, for example the continued research to understand the impact of live-to-digital on the live theatre.

We will...

• Improve the collection and reporting of UK Theatre venue sales data (working with SOLT), and improving our offer to members.
• Support the sector to use sales, audience and other organisational data to drive business resilience.
• Promote Arts Council/Audience Agency data sharing guidance.
• Explore other activity to support data sharing to develop audiences across the country.
• Identify and conduct research relevant to UK Theatre and its membership.

Measures of success

• Delivery of a clearly defined timeline and action plan for data analysis and research.
• Each area of research and analysis to have specific objectives.
• Positive feedback from members and the industry.

Goal

CELEBRATE EXCELLENCE THROUGH THE UK THEATRE AWARDS

The UK Theatre Awards are an important opportunity to celebrate success and innovation in theatre and the performing arts across the whole of the UK.

We aim to develop the awards so that they are more visible than ever before, and reflect the areas of best practice and excellence in our sector.

We will...

• Undertake a review of the UK Theatre Awards, to include an update of the award categories, as well as a review of the application and judging process to ensure a better understanding and engagement with the awards throughout our membership.
• Explore the feasibility of linking the UK Theatre Awards to the Olivier Awards.

Measures of success

• Review of the UK Theatre Awards to result in clearly defined objectives.
• Attendance and satisfaction ratings for the UK Theatre Awards.
• An integrated approach to diversity across the UK Theatre awards.
**Goal**

**TRAINING AND EVENTS**

We will review and develop the UK Theatre training and events and conference programme to ensure it is relevant and useful, including to meet the recommendations of the workforce research.

The programme will continue to offer a range of paid-for training courses, events and conferences. We will also continue to offer some events free of charge when it is possible and appropriate to do so – for example the venue security meetings held in 2016.

**We will...**

- Reach a broader section of organisations and individuals through a better geographical spread of events.
- Facilitate networking and the sharing of resources between members.
- Work with the Federation of Scottish Theatre to develop our training offer in Scotland.
- Introduce online learning and films.
- Explore shared networking opportunities, promote UK Theatre training clearly to SOLT members, and to non-members.
- Explore the potential for UK Theatre’s own programme of training and events to be accredited by an awarding body.

**Measures of success**

- Delegate numbers and satisfaction ratings for training and events overall, and for specific courses.
- Review of the training and events programme to result in clearly defined objectives (linked to those resulting from the workforce research).
- The diversity of trainers, facilitators and contributors to UK Theatre courses and events.

**Goal**

**ADVOCACY, THOUGHT AND SECTOR LEADERSHIP**

We aim to ensure that our communications and campaigning work establishes UK Theatre as a trusted and knowledgeable voice on issues affecting the industry (with SOLT where appropriate). Our influence with the UK governments and other stakeholders will grow, and our work to support theatre and the performing arts will become more visible.

We will make sure that UK Theatre’s communications become more timely, responsive and informative, and we will aim to improve our reach.

UK Theatre will also lead the sector’s voice on key issues.

**We will...**

- Lead campaigns on key issues, for example:
  - The UK’s exit from the EU; funding, freedom of movement, the role of theatre and performing arts in society.
  - The vital need to improve the diversity of the theatre and performing arts sector.
  - The value and importance of local authority funding.
  - The value and importance of theatre within education.
  - Gift aid.
  - Ticketing.
- Respond effectively to arising issues – this includes responses to national government policy and local issues.
- Partner on aligned campaigns – for example the Family Arts Campaign, National Campaign for the Arts, Parents in Performing Arts, and work with the What Next? movement.

**Measures of success**

- Usage and engagement with online content.
- Satisfaction rating for the training and events prospectus.
- Benchmarking of our support in Westminster and Whitehall to begin, and engagement to grow.
- Our communications to members will demonstrate evidence of UK Theatre’s advocacy to Government and the wider sector.
- Members and all stakeholders report better coordination with Creative Scotland, Arts Council Wales and Arts Council England.
3. Resourcing
3. Resourcing

Working with the Society of London Theatre

UK Theatre will continue to work with SOLT to support the whole of the theatre and performing arts sector, whether publicly funded or commercial.

SOLT and UK Theatre recognise that there is interdependency between theatre and performing arts across the country, and between the funded and commercial sector. Our combined support for theatre and the performing arts is for one UK-wide industry, encompassing London and the regions.

In recent years SOLT and UK Theatre have worked together on shared areas of interest for the industry. We intend to take this partnership further over the life of the next UK Theatre business plan, and to continue to find areas on which we can share and focus support for our membership across the industry.

UK Theatre staffing

UK Theatre and SOLT will continue to share staff and resources, with UK Theatre benefiting from the skills and experience in the joint team for Legal, Employment Relations, Awards, Finance, HR, Media and Digital support.

The level and cost of this joint support with SOLT will be reviewed by UK Theatre’s Finance and Strategy Committee annually to ensure that it remains good value and at an appropriate level.

The UK Theatre team structure was reviewed in 2016 in order to ensure that the right skills and experience to deliver our new business plan were in place. In addition to the essential resource shared with SOLT, the five roles within the UK Theatre team are: Head of UK Theatre, Events and Administrative Assistant, Advocacy Manager, Membership Engagement Executive, Training and Events Executive.
4. Finances

OVERVIEW OF UK THEATRE’S PROJECTED INCOME FOR 2017-21
4. Finances

Overview of UK Theatre’s projected income for 2017-21

UK Theatre enters this planning period in a stable financial position. While the forecast for 2017 is to maintain a healthy reserve, UK Theatre’s plans are ambitious and will require investment that will mean careful budget planning.

In the context of an uncertain economic environment there are also risks associated with areas of UK Theatre’s income. For this reason our priority over the next few years will be to build UK Theatre’s long term sustainability by increasing income received from events, training and partnerships.

Subscriptions

We begin this business planning period with healthy levels of membership in all categories. UK Theatre will continue to build on the numbers of Professional Members, and there is room for growth with the Partner Member category. We intend to maintain the number of Organisation Members.

Events and training

There is potential to improve on the income generated from our training and events and conference programme, particularly following the review of the programme that will take place in 2017.

We will also continue to offer some events free of charge when it is possible and appropriate to do so.

Theatres Development Trust

The Theatre Development Trust (TDT) exists to promote and advance the dramatic and other performing arts for the benefit of the public. The charity is funded by an element of the balance of unredeemed Theatre Tokens, which is loaned to the Theatre Development Trust thereby generating income for charitable purposes.

UK Theatre’s training and events programme has been supported by a substantial grant from the TDT for a number of years. A number of recent research projects, carried out jointly with the Society of London Theatre, have also been funded in whole or part by the TDT.

Where aspects of UK Theatre’s work can be seen to meet the charitable objects of the TDT we will consider the opportunity to apply for grants to fund distinct projects. Our annual updates on our progress to achieve our goals will note when work has been funded by the Theatre Development Trust.

The Theatre Development Trust will review its charitable objectives in 2017. Any change to UK Theatre’s likely income from the TDT will be communicated to the UK Theatre Board and to members in our Annual Review.

Partnerships

UK Theatre has a number of long term and valued partnerships in place with key industry service providers. Over the coming years we intend to develop and grow these partnerships, and to develop new relationships with a broader range of organisations to ensure our financial resilience. We will prioritise organisations with regional presence and national reach.

Overview of UK Theatre’s projected expenditure for 2017-21

Project costs

Over the course of this planning period UK Theatre will take forward a number of projects that will require some investment if they are to make an impact on the health and resilience of the sector. The key areas (as detailed elsewhere in the business plan) are:

- Data collection, analysis and reports.
- Research projects: touring, live to digital.
- Diversity in casting planning tool.
- Guidance and case studies.
- Development of an online and digital training offer.
## UK Theatre Association - Business Plan - Financials

### INCOME

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### EXPENSES

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<td>187,084</td>
<td>190,825</td>
</tr>
<tr>
<td>Sales Data Collection / Analysis</td>
<td>22,000</td>
<td>15,000</td>
<td>15,300</td>
<td>15,606</td>
<td>15,918</td>
</tr>
<tr>
<td>Development/Project Costs</td>
<td>12,500</td>
<td>10,000</td>
<td>10,000</td>
<td>10,000</td>
<td>10,000</td>
</tr>
<tr>
<td>Events &amp; Training Costs</td>
<td>118,620</td>
<td>120,132</td>
<td>122,535</td>
<td>124,986</td>
<td>127,485</td>
</tr>
<tr>
<td>UK Theatre Awards</td>
<td>58,000</td>
<td>59,160</td>
<td>60,343</td>
<td>61,550</td>
<td>62,781</td>
</tr>
<tr>
<td>Promotion/Marketing</td>
<td>7,760</td>
<td>7,915</td>
<td>8,074</td>
<td>8,235</td>
<td>8,400</td>
</tr>
<tr>
<td>Website/CRM/Computer</td>
<td>9,157</td>
<td>9,340</td>
<td>9,527</td>
<td>9,717</td>
<td>9,912</td>
</tr>
<tr>
<td>Other Costs (e.g. Travel, Catering, Legal, &amp; Professional, Blog, Subscriptions)</td>
<td>44,177</td>
<td>43,489</td>
<td>44,359</td>
<td>45,246</td>
<td>46,151</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>900,662</strong></td>
<td><strong>901,533</strong></td>
<td><strong>914,796</strong></td>
<td><strong>928,280</strong></td>
<td><strong>941,987</strong></td>
</tr>
</tbody>
</table>

### NET PROFIT/(LOSS)

<table>
<thead>
<tr>
<th>NET PROFIT/(LOSS)</th>
<th>2017 £</th>
<th>2018 £</th>
<th>2019 £</th>
<th>2020 £</th>
<th>2021 £</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4,136</td>
<td>(1,813)</td>
<td>(4,093)</td>
<td>3,113</td>
<td>10,258</td>
</tr>
</tbody>
</table>
5. Summary of activities, timeline and KPIs
## 5. Summary of activities

### Timeline

<table>
<thead>
<tr>
<th>OBJECTIVES</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support the health of touring, producing and presenting ecology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establish programme of work to improve the landscape for touring</td>
<td>Develop</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Annual delivery of the Touring Symposium</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Ensure UK Theatre Membership is fit for purpose</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monitor the offer to; Local Authority funded members; Concert Halls</td>
<td>Review</td>
<td>Deliver</td>
<td></td>
</tr>
<tr>
<td>Review and improve Professional Membership</td>
<td>Review</td>
<td>Deliver</td>
<td>Review</td>
</tr>
<tr>
<td>Explore the potential to introduce student membership</td>
<td>Develop</td>
<td>Deliver</td>
<td>Review</td>
</tr>
<tr>
<td>Potentially revise membership fees</td>
<td></td>
<td></td>
<td>Review</td>
</tr>
<tr>
<td>Modernise the sector’s approach to Employment Relations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop the strategic dialogue with the Trade Unions</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Modernise agreements</td>
<td>Develop</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Legal Service</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintain the quality of the legal service</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Advise and support on legal issues arising from the UK Theatre business plan</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Buildings, technical and security</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop security best practice guidance and briefings</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>New conference focusing on backstage, technical and security</td>
<td>Deliver</td>
<td>Review</td>
<td>Review</td>
</tr>
<tr>
<td>Occupational health related initiatives and training</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Work with the National Counter Terrorism and Security office</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Research and analysis to drive the resilience of the sector</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve the collection and reporting of UK Theatre sales data</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Promote Arts Council/Audience Agency data sharing guidance</td>
<td>Deliver</td>
<td>Review</td>
<td>Review</td>
</tr>
<tr>
<td>Support activity to improve data sharing to develop audiences</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
<tr>
<td>Identify and conduct research relevant to UK Theatre and its membership</td>
<td>Deliver</td>
<td>Deliver</td>
<td>Deliver</td>
</tr>
</tbody>
</table>

### Support the health of touring, producing and presenting ecology

- **Establish programme of work to improve the landscape for touring**
  - Develop: 2017
  - Deliver: 2018
  - Deliver: 2019

- **Annual delivery of the Touring Symposium**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019

### Ensure UK Theatre Membership is fit for purpose

- **Monitor the offer to; Local Authority funded members; Concert Halls**
  - Review: 2017
  - Deliver: 2018
  - Deliver: 2019

- **Review and improve Professional Membership**
  - Review: 2017
  - Deliver: 2018
  - Deliver: 2019

- **Explore the potential to introduce student membership**
  - Develop: 2017
  - Deliver: 2018
  - Review: 2019

- **Potentially revise membership fees**
  - Review: 2019

### Modernise the sector’s approach to Employment Relations

- **Develop the strategic dialogue with the Trade Unions**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019

- **Modernise agreements**
  - Develop: 2017
  - Deliver: 2018
  - Deliver: 2019

### Legal Service

- **Maintain the quality of the legal service**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019

- **Advise and support on legal issues arising from the UK Theatre business plan**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019

### Buildings, technical and security

- **Develop security best practice guidance and briefings**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019

- **New conference focusing on backstage, technical and security**
  - Deliver: 2017
  - Review: 2018
  - Review: 2019

- **Occupational health related initiatives and training**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019

- **Work with the National Counter Terrorism and Security office**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019

### Research and analysis to drive the resilience of the sector

- **Improve the collection and reporting of UK Theatre sales data**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019

- **Promote Arts Council/Audience Agency data sharing guidance**
  - Deliver: 2017
  - Review: 2018
  - Review: 2019

- **Support activity to improve data sharing to develop audiences**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019

- **Identify and conduct research relevant to UK Theatre and its membership**
  - Deliver: 2017
  - Deliver: 2018
  - Deliver: 2019
OBJECTIVES 2017 2018 2019

**Celebrate excellence through the UK Theatre Awards**
- Review the UK Theatre Awards: Review, Deliver, Review
- Explore linking the UK Theatre Awards to the Olivier Awards: Review, Deliver, Deliver

**Training and events**
- Review and develop the UK Theatre programme of training and events and conferences: Review, Deliver, Deliver
- Work with FST to develop our training in Scotland: Review, Deliver, Review
- Introduce online learning and films: Develop, Deliver, Deliver
- Explore shared networking opportunities: Deliver, Deliver, Deliver
- Accreditation: Review, Deliver

**Advocacy and Communications**
- Respond to issues relating to exit from European Union: Deliver, Deliver, Review
- Ensure that UK Theatre’s voice is heard as a core part of driving forward the diversity agenda: Deliver, Deliver, Deliver
- Deliver LA funding advocacy campaign: Deliver, Review, Review
- Scope theatre in education campaign: Review, Deliver, Deliver
- Scope Gift Aid campaign: Review, Review, Deliver
- Monitor and advocate for fair ticketing: Deliver, Review, Review
- Develop blog and online content: Deliver, Deliver, Deliver
- Improve connections and support in Westminster and Whitehall: Deliver, Deliver, Deliver
- Communicate with members about UK Theatre’s advocacy work: Deliver, Deliver, Deliver
- Develop relationship with Creative Scotland, Arts Council Wales and Arts Council England: Deliver, Deliver, Deliver
- Develop a new look training and events brochure: Deliver, Review, Review

**Finances**
- Sponsorship/partnerships strategy: Develop, Deliver, Deliver
- Review of UK Theatre and SOLT joint costs: Deliver, Deliver, Deliver

---

**Key Performance Indicators**

<table>
<thead>
<tr>
<th>Key Performance Indicators</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>KPI 1 - Number of Organisation Members</td>
<td>210</td>
<td>215</td>
<td>220</td>
<td>220</td>
<td>220</td>
<td>220</td>
</tr>
<tr>
<td>KPI 2 - Number of Partner Members</td>
<td>70</td>
<td>80</td>
<td>90</td>
<td>100</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>KPI 3 - Number of Professional Members</td>
<td>1000</td>
<td>1380</td>
<td>1500</td>
<td>1600</td>
<td>1700</td>
<td>1700</td>
</tr>
<tr>
<td>KPI 4 - Diversity of UK Theatre membership</td>
<td>Establish baseline</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KPI 5 - Retention of UK Theatre membership</td>
<td>Establish baseline</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>KPI 6 - Overall satisfaction of Organisation Members*</td>
<td>1.1</td>
<td>1.5</td>
<td>1.6</td>
<td>1.7</td>
<td>1.8</td>
<td>2</td>
</tr>
<tr>
<td>KPI 7 - Overall satisfaction of Partner Members*</td>
<td>1.1</td>
<td>1.3</td>
<td>1.4</td>
<td>1.6</td>
<td>1.8</td>
<td>2</td>
</tr>
<tr>
<td>KPI 8 - Overall satisfaction of Professional Members*</td>
<td>1.1</td>
<td>1.5</td>
<td>1.6</td>
<td>1.7</td>
<td>1.8</td>
<td>2</td>
</tr>
<tr>
<td>KPI 9 - Usage Legal Affairs**</td>
<td>72%</td>
<td>72%</td>
<td>72%</td>
<td>72%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td>KPI 10 - Satisfaction Legal Affairs**</td>
<td>68%</td>
<td>68%</td>
<td>68%</td>
<td>68%</td>
<td>68%</td>
<td>68%</td>
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<tr>
<td>KPI 11 - Usage Employment Relations</td>
<td>85%</td>
<td>85%</td>
<td>87%</td>
<td>87%</td>
<td>89%</td>
<td>89%</td>
</tr>
<tr>
<td>KPI 12 - Satisfaction Employment Relations**</td>
<td>74%</td>
<td>75%</td>
<td>76%</td>
<td>77%</td>
<td>78%</td>
<td>79%</td>
</tr>
<tr>
<td>KPI 13 - Usage Theatre Awards UK</td>
<td>28%</td>
<td>30%</td>
<td>35%</td>
<td>40%</td>
<td>45%</td>
<td>50%</td>
</tr>
<tr>
<td>KPI 14 - Satisfaction Theatre Awards UK**</td>
<td>56%</td>
<td>58%</td>
<td>60%</td>
<td>60%</td>
<td>62%</td>
<td>62%</td>
</tr>
</tbody>
</table>

* ‘very satisfied’ +2 and ‘very dissatisfied’ -2  
** % of respondents either ‘satisfied’ or ‘very satisfied’