



THE ARTS REVIEW FOR SOUTH AUSTRALIA

JULY 2019

Consultants' Report

Disclaimer – This Report was developed for the South Australian Government by external consultants. It draws on information, opinions and views provided by many people in the community.

This Report does not necessarily reflect the views of the Government or indicate its commitment to a particular course of action.



Acknowledgement of Country

Aboriginal people have made and continue to make a unique and irreplaceable contribution to the state of South Australia.

The South Australian Government acknowledges and respects Aboriginal people as the state's first people and nations, and recognises Aboriginal people as traditional owners and occupants of South Australian land and waters.

The South Australian Government acknowledges that the spiritual, social, cultural and economic practices of Aboriginal people come from their traditional lands and waters, and that the Aboriginal people maintain cultural and heritage beliefs, languages and laws which are of ongoing importance today.



Dear Premier Marshall

We have pleasure in submitting this Report on the Review of Arts and Culture for South Australia.

It has been a privilege for the Consulting team to engage with so many talented and committed artists, arts administrators and members of the community from across the state.

People care deeply about the arts in South Australia. They care about its reputation, and they seek to honour that reputation by contributing to a vibrant and distinctive future.

The community welcomed this Review, and contributed with optimism and generosity. We have engaged with over 2,500 people in a range of ways – live meetings, focus groups, town hall style meetings, an online Survey and through written submissions.

Our Report does not propose radical change. Rather, it recommends ways to enhance focus, practice and process in a range of areas, responding to the many changes in South Australia since the last review of the arts was undertaken in 2000.

A focus of the Report is on collaboration, reflecting a desire frequently expressed by the community to see a more connected and participatory arts community. This focus on collaboration also reflects a priority of your Government, to achieve greater integration of policy and practice across agencies.

The Report makes 32 Recommendations against the 8 Objectives provided by the Government as the Terms of Reference for this Review. In addition, the Review found that 5 additional areas were critical to future success, and therefore we have made 13 Recommendations against these 5 Objectives.

We believe that accepting and implementing these recommendations in a timely manner will provide a sound framework to enable the arts and culture sector across South Australia to thrive.

We thank you for your leadership in commissioning a Plan and Review. It has been a pleasure to serve the people of South Australia in this way.

Yours Sincerely

Tony Grybowski and Graeme Gherashe
Lead Consultants
Gherashe Consultants Pty Ltd

CONTENTS

EXECUTIVE SUMMARY	1
Key Findings.....	3
Recommendations.....	5
THE CONSULTATION	9
Background	9
The Consultants	9
Methodology.....	9
Live meetings.....	10
Focus groups.....	10
Town Hall Forums	10
Written Submissions	10
Online Survey	10
Advisory Group.....	11
OBJECTIVES.....	12
Objective 1	13
Ensure that the arts, cultural and creative sectors in South Australia thrive throughout the year.	
Objective 2	19
Review grant programs, to ensure that existing funds and increased grant allocations are focused on supporting independent artists and organisations and a successful and sustainable ecosystem for creative enterprise.	
Objective 3	29
Consider what more we can do to meet the needs of regional and rural South Australia, local cultural activity in regional towns and centres, career pathways for artists from the regions, and access to regional touring opportunities for large and small companies.	
Objective 4	35
Develop and deliver on a state-wide Digital Access Plan for our irreplaceable cultural collections – building on the work of those institutions that are already engaged in this work and helping to ensure that these collections are therefore accessible to all South Australians and the world. Digital platforms provide a window to the world for South Australia’s unique cultural heritage and we must take advantage of this opportunity to showcase ourselves.	



Objective 5	39
Ensure the Adelaide Festival Centre Trust’s newly redeveloped venues, including Her Majesty’s Theatre, enable it to take collaboration with our major performing arts companies to a new level.	
Objective 6	45
Examine arts governance and encourage more resourcefulness, tasking our arts boards to have a stronger focus on diversifying funding sources, but at the same time looking to provide rolling triennial funding to arts organisations to improve their opportunities for long term planning.	
Objective 7	51
Ensure that through a whole-of-government approach, the benefits of the <i>Arts and Culture Plan 2019-2024</i> is able to be realised across the range of sectors where the community interacts with government.	
Objective 8	55
The Arts Plan will explore and consider new opportunities for new partnerships and collaborations.	
Objective 9	59
Aboriginal arts and culture – what are the strengths and opportunities?	
Objective 10	71
Education in the arts – new learning opportunities.	
Objective 11	79
International Engagement - Inform and establish a strategy for international engagement of the Arts and Culture sector including the creative industries.	
Objective 12	85
How to approach the issue of storage for the collections in South Australia.	
Objective 13	89
Evaluation and Measurement – the measurement of value and impact of the investment into Arts and Culture in South Australia.	
BIBLIOGRAPHY	93
APPENDIX	96
Appendix A Survey Report	97
Appendix B Consulting Team	127



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EXECUTIVE SUMMARY

It is twenty years since a major review of the state of arts and culture was undertaken in South Australia. The Marshall Government is commended for its decision to commission this Review and the development of a five-year *Arts and Culture Plan 2019-2024*.

Much has changed in South Australia in the years since the 2000 review.

South Australia's history is marked with many 'firsts' in arts and culture, and this Review seeks to provide a framework to deliver leadership and innovation that will sustain the state's deserved cultural reputation for the years ahead.

As the 2019 review of *South Australia's International and Interstate Engagement Bodies and Functions* undertaken by the Hon Steven Joyce notes, the focus of the South Australian economy has transitioned from traditional manufacturing to human services and emerging technologies, which require new skills, and a priority to support innovation. The Review recognises that creativity and innovation will be key to the workforce of the future. This Report addresses the role of arts and culture in achieving that ambition.

Over the past twenty years there have been dramatic changes in the diversity of the community and its cultural expression. We are witnessing the democratisation of cultural expression, enabled by the rapid emergence of digital technologies, screen-based including film, television and gaming, and collaborative arts practice. Art is now for everybody, and everybody can be a part of making art. Our cultural and creative institutions are increasingly inviting audiences to collaborate in the creative process. This changing relationship between the artist and the audience presents exciting opportunities.

This trend to nurture a more participatory creative culture is central to supporting the skills required for South Australia's emerging economy – the ability to innovate, to think anew and respond to the opportunity presented by new technologies.

The state's collecting institutions hold the unique record of the history of the state, both for the Aboriginal peoples, and for the more recent presence of migrant communities. This history is interpreted and expressed through diverse cultural forms. This is the DNA of South Australia's identity, and a connected narrative waiting to be told to audiences across the state and beyond.

There is opportunity for a more collaborative approach to the way in which the community engages with this cultural record to present a more connected and coherent story of South Australia. The cultural precinct of Adelaide's North Terrace and its adjacencies provides a platform to highlight the complementary nature of collections, and the way in which they reflect the social, economic, political and cultural climate of the state, both pre- and post-colonisation. Similarly, the potential to digitise the state's rich history and collection provide other opportunities to heighten awareness of their complementary nature and, in doing so, significantly increase access and utilisation.

South Australia has a mature and respected education system. This Report explores opportunities for the arts to play a more central role in the primary, secondary and tertiary sectors, in recognition of the contemporary focus on creativity and innovation as key 21st century learning skills.

The Report seeks to enhance focus on Aboriginal and Torres Strait Islander (ATSI) history and culture. This represents an opportunity to achieve greater control of the cultural narrative by its owners, and enhanced access to it by the wider community. A more connected approach, spanning the creative community and government will be central to achieving this ambition.

This Review has been undertaken over a six-month period. Its scope and time-frame have enabled a broad set of recommendations which provide focus and direction for the sector, and refine and enhance a range of current practices. The path ahead is evolutionary rather than revolutionary. Given the time-frames and eight Objectives, set by the government, which have defined the Review methodology, we recognise this is not a comprehensive assessment of the complex ecology that makes up the arts and culture sector in the state.

During the course of the Review a number of further themes emerged, which the consultants recognised deserved additional focus. Five additional Objectives accompany the original eight provided. Our recommendations identify a number of areas which we believe would benefit from a more detailed, specialised review.

The Report has also referenced a number of earlier studies addressing Aboriginal and Torres Strait Islander peoples arts strategy, the collection storage requirements for the major cultural institutions and opportunities for the development of vocational training for the sector. Each has provided valuable insights, and we support their further review and implementation. Further valuable insights were sourced from the contributions of the Arts Industry Council of South Australia and Festivals Adelaide.

As referenced in the Key Findings, the Review notes the economic environment in South Australia, and this has informed the development of recommendations that offer opportunities for growth, and require limited additional funds to respond to future investment priorities.

A theme that informs many of the recommendations across the 13 Objectives is collaboration. The evolution of a vibrant collaborative culture, both across the sector and across governments and industry, could set South Australia apart, and establish its 'point of difference'.

We recognise the challenges in establishing a sustainable and productive collaborative culture. This will require distinctive leadership and new styles of management.

The recommendations therefore include a number designed to act as catalysts for collaboration. These provide potential collaborative pathways, along with incentives to support their implementation. We are not aware of similar commitments in other states to achieve such cultural change, and believe the opportunity to boldly embrace collaboration has the potential to redefine the sector's position and reputation both in Australia and internationally.

South Australia is more than 'the Festival State' and we trust the approach we have taken provides for a more balanced and dynamic culture for the state, and one with a clearer focus on its direction over the next five years and beyond.

South Australia is in a strong position to embrace its challenges, and by working together achieve the greater success the community deserves.

KEY FINDINGS

Most significantly, the Review found that the state was at a turning point, with an opportunity to harness the creative talent and spirit of the community to reposition arts and culture more deeply within the state's identity. The Review identified opportunities to tell the South Australian story in new ways, inviting a spirit of collaboration and connectivity spanning artists and creators, the state's fine cultural institutions and their unique collections.

The Review found the sector is in reasonable health overall and there were many examples of success, creative leadership and excellence. Some parts of the ecology however were struggling and sought greater cohesiveness, leadership and clear direction. A number of the recommendations in this Report and in the associated *Arts and Culture Plan 2019-2024* seek to provide this focus.

The Review noted that there is a greater awareness and understanding of the role that arts and culture plays in the wider community – the social benefits helping to support, heal and grow communities. There is also understanding that creative skills and practice are key dimensions of the workforce of the future, and that more formal links with education and industry are required to nurture the skills required to support the state's developing economy.

The Review does not make recommendations requiring significant additional government expenditure. It does however identify two areas requiring immediate investment support. The first is the urgent need to address storage for the state's remarkable collections, and the second recognises the need to accelerate and coordinate the digitisation of those collections. The benefits of these investments would be manifold, ensuring the long-term custodianship of unique resources, while increasing their accessibility beyond the walls of the institutions who hold them.

There was widespread recognition of the need to achieve a balanced arts and culture community across the state – one that supports the major state cultural institutions alongside the small to medium sector and individual artists, makers and creators. There was frequent reference for opportunities for these communities to be more effectively connected, linked or interdependent.

The signature strengths of South Australia's arts and culture sector are diverse. These strengths have emerged to define the identity and recognition of the sector within Australia and internationally. These strengths include its Festival State reputation, as the Adelaide Festival, the Adelaide Festival Centre and the Adelaide Fringe have inspired an annual calendar of arts festivals of remarkable diversity. The State's expansive art collection, its museum collections, libraries, Indigenous collections and centres as well as its world leading youth arts sector, music sector and designation as a UNESCO City of Music, its film industry and its regional arts program, craft and design and gaming are all strengths. Most recently Adelaide has embraced the potential of new technologies, and as a GigCity, it has the potential to create new opportunities and a window to the world for South Australian creators and makers.

A 'siloed' culture is a current characteristic of the sector. There are opportunities to work towards a more collaborative culture, and for this to generate work that reflects the benefits of multiple creative inputs. This has the potential to define cultural expression in the state, and its 'point of difference'.

The arts are traditionally 'siloed' within government. There are opportunities to more effectively connect the sector with other parts of government – education, health, skills and employment, regional development and tourism. This will require leadership to develop creative partnerships that exploit the benefits of cross-agency collaboration.



The Review noted the machinery of government changes in 2018 for Arts South Australia and the creation of a specialist arts team within the Department of the Premier and Cabinet. Some concern at the loss of an independent arts department was noted, whilst others recognised the opportunity this change provides. Careful analysis of the business needs and skills of the Arts South Australia unit will be required to ensure its appropriate future staffing skills mix.

Funding is an issue for many in the sector, and there is a high level of dependence on government support. There is the opportunity for some institutions and organisations to build their capacity and take a leadership role in identifying and pursuing alternate funding streams. This is a priority concern in an environment of reduced state government support for the arts.

The governance of the arts boards and institutions was a particular focus of the Review. It was observed that the network of board members serving the community through an arts directorship was large. It is not uncommon for board members to have served on multiple state-appointed boards, which can offer both benefits and limitations. There are opportunities for boards to embrace diversity, develop greater skills and in some cases 'refresh' governance practice to explore more contemporary, efficient and effective governance models. Aboriginal representation on boards needs to be addressed as a priority.

The issue of diversity was a feature of the consultation process. This was expressed in a number of ways – as diversity of arts practice, culture and audience demographics. Some recognised that this diversity was leading to a different relationship between the artist and the audience, and in some cases contributing to a more participatory culture. This creates an opportunity for the wider community to work together and elevate the role of the artist and cultural activity in society.

A real willingness to embrace reconciliation and to work more closely with Aboriginal people was a consistent theme of the Consultation. Many expressed uncertainty about how to establish more collaborative partnerships with Aboriginal people. Conversely, there is frustration amongst Aboriginal people at the lack of progress in implementing outcomes of previous reviews relating to arts and culture.

Consultation spoke to the fact that South Australia, and in particular Adelaide, is an excellent place for artists to live. It is accessible, affordable and offers the benefits of open and supportive artist networks.

Many agreed that the arts, culture and creativity is the future – and these support social cohesion, skills linked to employment, economic return, health and wellbeing, and identity. It is time to embrace that future.

RECOMMENDATIONS

The Recommendations are listed according to the Objectives of the Review.

- 1. Ensure that the arts, cultural and creative sectors in South Australia thrive throughout the year.**
 - 1.1. Develop an annual schedule of festivals for South Australia.
 - 1.2. Develop a space activation plan for use by independent artists and the small to medium sector to optimise existing venues and spaces across Adelaide and regional centres.
 - 1.3. Investigate options and implement a new, cost-effective, 'consortium' ticketing system to support the small to medium sector and other arts organisations (including Country Arts SA) who are not serviced by existing systems.
 - 1.4. Fund a business case to assess the viability of an acoustic venue (concert hall) to serve the local music industry, as a home for the Adelaide Symphony Orchestra and Adelaide Youth Orchestras, and as a hub for music education.
 - 1.5. Fund a feasibility study to identify options for the creation of a black box theatre for Adelaide.
 - 1.6. Develop a five-year revitalisation plan of regional arts centres as creative hubs within their respective communities.
- 2. Review grant programs, to ensure that existing funds and increased grant allocations are focused on supporting independent artists and organisations and a successful and sustainable ecosystem for creative enterprise.**
 - 2.1. Maintain the existing Grant funding structure and assessment processes, supporting the South Australian arts sector until a new model appropriate to the South Australian community is developed and implemented in 2021.
 - 2.2. Establish a 2-year Creative Fellowship program to provide support to South Australian artists and cultural leaders across all disciplines.
 - 2.3. Develop an Arts Investment funding model to be implemented in 2021.
 - 2.4. Work towards harmonised application, assessment and funding timelines and grant management for the major and small to medium companies with the Federal Government and the Australia Council for the Arts.
 - 2.5. Establish an Arts Organisations Collaboration Fund.

- 3. Consider what more we can do to meet the needs of regional and rural South Australia, local activity in regional towns and centres, career pathways for artists from the regions, and access to regional touring opportunities for large and small companies.**
 - 3.1. Maintain Country Arts SA as a Statutory Authority to support arts and cultural development across the state. Review its funding levels to ensure it can optimise its position and deliver on its Strategic Plan.
 - 3.2. Revitalise existing regional arts centres as creative community hubs and invest in new centres to meet the needs of the local community and elevate their role and standing.
 - 3.3. Reform governance options for regional arts venues to ensure effective engagement with local government and alignment with local community needs.
- 4. Develop and deliver on a state-wide Digital Access Plan for our irreplaceable cultural collections, building on the work of those institutions that are already engaged in this work and helping to ensure that these collections are therefore accessible to all South Australians and the world. Digital platforms provide a window to the world for South Australia's unique cultural heritage and we must take advantage of this opportunity to showcase ourselves.**
 - 4.1. Undertake a feasibility study to create a new digitisation business that provides this service to the sector across the state – along the lines of Artlab Australia, as a semi-commercial, not for profit enterprise.
 - 4.2. Establish a Digital Cultures Fund to support digital infrastructure and digital skills development.
 - 4.3. Establish a Digital Cultures Matched Fund supporting digital learning and innovation.
- 5. Ensure the Adelaide Festival Centre Trust's newly redeveloped venues, including Her Majesty's Theatre, enable it to take collaboration with our major performing arts (MPA) companies to a new level.**
 - 5.1. Establish clear protocols and procedures to enhance collaboration between the key small to medium and major companies and organisations, to ensure the best possible artistic outcomes and best use of the publicly-owned facilities, including the AFC, for the South Australian community and its arts sector.
 - 5.2. Require that the Chairs and CEOs of all the resident and non-resident companies that utilise the AFC meet on a regular basis (six-monthly) to understand the scheduling and other challenges of the AFCT.

6. **Examine arts governance and encourage more resourcefulness, tasking our arts boards to have a stronger focus on diversifying funding sources, but at the same time looking to provide rolling triennial funding to arts organisations to improve their opportunities for long-term planning.**
 - 6.1. Establish a comprehensive Board capacity development program for South Australian arts organisations.
 - 6.2. Source and allocate support for a full-time senior representative of Creative Partnerships Australia serving South Australia and to be based in Adelaide.
 - 6.3. Undertake a five-year program to modernise and streamline the overarching governance structure for the state's Statutory Authorities. Revisit previous work in streamlining the range of statutory and other government arts and cultural entities to support the long-term effectiveness and efficiency of these arts organisations.
 - 6.4. Increase diversity across all South Australian arts boards. In particular ensure representation of young people, and people of Aboriginal and non-English speaking background – through specific targets and via the powers existing by the government under the Statutory Authorities.
 - 6.5. Promote increased utilisation of the Australian Cultural Fund run by Creative Partnerships Australia.
7. **Ensure that through a whole-of-government approach, the benefits of the *Arts and Culture Plan 2019-2024* is able to be realised across the range of sectors where the community interacts with government.**
 - 7.1. Develop a whole of government measurement framework.
 - 7.2. Devise a coordinated set of Arts and Culture targets across relevant ministries to support the delivery of programs achieving social outcomes and impacts from arts and cultural focused activity.
 - 7.3. Initiate a role in DPC with an arts and cultural, cross government, departmental liaison function to assist the arts sector to connect and link across various departments and policies.
8. **The Arts Plan will explore and consider new opportunities for new partnerships and collaborations.**
 - 8.1. Establish a collaborative fund, in support of the development and delivery of projects that result from collaboration between two or more creative partners.
 - 8.2. Initiate a program to support the development of content from across several institutions to collectively tell *The Story of South Australia*.
 - 8.3. Establish an *Adelaide 100 Objects Walk*.
 - 8.4. Devise and develop a Cultural Ambassadors Program.

Additional Objectives

9. Aboriginal arts and culture – what are the strengths and opportunities?

- 9.1. Commit to the release of an Aboriginal and Torres Strait Islander Arts Strategy for South Australia that captures the previous consultation and strategy work undertaken for this purpose.
- 9.2. Build leadership pathways and cultural career pathways and opportunities.
- 9.3. Focus on developing significant intergenerational learning and inter-cultural initiatives.
- 9.4. Stimulate the development of Aboriginal cultural infrastructure for practice, learning and community.
- 9.5. Develop regional and remote art centres as community hubs.

10. Education in the arts – new learning opportunities.

- 10.1. Develop South Australia as the centre for Arts tertiary education through development of a compelling BRAND.
- 10.2. Undertake a review as to the demand and feasibility of creating a Performing Arts High School/College in Adelaide.
- 10.3. Work towards adopting the principles of STEAM in primary and secondary curricula.
- 10.4. Arts South Australia and the TAFE to partner to develop lifelong learning modules for the sector, including makers, creators and administrators.

11. International Engagement – Inform and establish a strategy for international engagement of the Arts and Culture sector including the creative industries.

- 11.1. Develop an export and investment strategy for South Australia's arts and creative industries.
- 11.2. Develop a strategy to attract international students to Adelaide as a leading centre for Arts Tertiary education in Australia.
- 11.3. Develop a strategy to engage with the broader International student population from the time of their arrival in South Australia.

12. How to approach the issue of storage for the collections in South Australia.

- 12.1. Implement the recommendations of the Cultural Institutions Storage initiative and the scope of CISSA (Cultural Institutions Storage Steering Committee).

13. Evaluation and Measurement – the measurement of value and impact of the investment into Arts and Culture in South Australia.

- 13.1. Develop an evaluation and measurement framework that captures the value of arts and culture, one that builds on and draws together the existing work undertaken in this area.

THE CONSULTATION

BACKGROUND

The South Australian Government, under Premier Marshall, commissioned the development of an Arts and Culture Plan and an Arts Review ('the Review') of the Arts Sector in January 2019. This represents the first major review since that undertaken by Arts South Australia in 2000.

The *Arts and Culture Plan 2019-2024* ('the Plan') and this Review are presented as separate documents. They were prepared concurrently, and both draw from the same consultation process. Whilst they are independent documents, the Review references the alignment of recommendations with the goals of the Plan.

This Review is structured against the eight Objectives provided as terms of reference by the Government. The consultant team identified five additional critical areas and these have been included in this Report as additional Objectives.

The South Australian Government will respond to the Review, and lead the implementation of the recommendations it accepts, in partnership with South Australia's arts and culture sector and the wider creative community.

In preparing both documents the consultant team spent three months seeking input from the community across South Australia. One-on-one meetings, town hall community forums, written submissions, national and international research and an online survey provide the framework for this project.

The consultant team thanks the 2500-plus individuals and organisations who engaged with the Review. We would like to thank the Arts South Australia team within the Department of the Premier and Cabinet for its support and assistance throughout this process. In addition, we thank the team at Country Arts SA for its assistance in the coordination of the regional town hall consultations.

THE CONSULTANTS

The consultant team was engaged through a competitive Expression of Interest and selection process under the South Australian Government procurement guidelines.

The team was led by Graeme Gherashe and Tony Grybowski and included Dr Sarah Barns, Ms Kathryn Deyell and Dr Claire Scobie. The project commenced in January 2019 and concluded on 30 July 2019 with the delivery of the two documents to the Government. A complete lists of the consultant team is in Appendix B.

METHODOLOGY

The Report was developed over four stages, spanning a six-month period.

The first stage involved a desk-top scan of available, relevant reports, reviews, data and information. This provided an invaluable overview of the arts and culture sector of South Australia. In addition, limited desk-top research was undertaken of some global trends within cultural policy within Australia and internationally. For the international research we are indebted to the assistance of IFACCA, the International Federation of Arts Councils and Culture Agencies.

The second, the consultation stage, commenced in February 2019. This involved extensive sector and community consultation across the state. It was supported by a call for written submissions and the release of an online survey.

The third stage involved collation and analysis of the data, information and feedback received through the previous stages of the project. The extensive body of material reviewed was on occasion reviewed and validated by key sector representatives and government agencies. This 'aligning' stage was critical in finalising both the Review and the Plan.

Consultation with the South Australian Aboriginal and Torres Strait Islander ('ATSI') community was a priority of the Consultant team. It was noted that extensive consultation with the ATSI community had taken place across 2017 and 2018 as part of a separate ATSI strategy. While the strategy was not completed, it did provide valuable insights into issues identified by the community as priorities, and these have been reflected in this Report.

LIVE MEETINGS

The consultant team undertook over 250 hours of live meetings with individuals and small groups from the arts and culture sector. These meetings spanned February–April.

Members of the consulting team also met with officials representing various parts of the Government. These included Treasury, Education, Industry and Skills, Tourism, Infrastructure SA and DFAT.

Given the alignment of this Review and the development on Lot Fourteen we also met with PWC who were undertaking a project to determine the governance structure and purpose of Lot Fourteen.

FOCUS GROUPS

The consulting team undertook three facilitated focus groups with 35 independent artists. A focus group was also held with 22 senior officials from the local government community.

TOWN HALL FORUMS

The consulting team facilitated 6 town hall-style community forums in Goolwa, the Barossa, Mount Gambier, Port Augusta, Port Adelaide and in Adelaide. A total of over 500 people attended these open community forums.

WRITTEN SUBMISSIONS

A call for written submissions from interested members of the community was made in February 2019 with 145 written submissions received by the closing date of 17 April, 2019.

ONLINE SURVEY

The online survey was launched in February and closed in April with 1843 responses. The summary findings are referenced throughout the Report and are provided in Appendix A. The Survey was supported by *YourSA*, the Government's online discussion forum.

ADVISORY GROUP

Aspects of the development of the *Arts and Culture Plan 2019-2024* were reviewed in their final stages by an Advisory Group. The Group included Anton Andreacchio, Robyn Archer AM, Lee-Ann Tjunypa Buckskin, Jacqui McGill and Professor Tanya Munro. Each brought a depth of understanding and passion for the arts in South Australia and we are grateful for the insights and observation that have made this a more robust and hopefully relevant Plan.

OBJECTIVES



1. OBJECTIVE 1

Ensure that the arts, cultural and creative sectors in South Australia thrive throughout the year.

1.1. Context

A primary focus of the Review has been the consideration of ways to achieve a balance of activity which recognises the state's deserved reputation for its program of festivals, whilst supporting a diverse and vibrant community of cultural institutions, small to medium organisations, and individual artists and makers.

South Australia's reputation as a cultural leader rests on decades of significant and sustained investment. This has helped to nurture an arts ecology with deep links across local, national and international networks. The Review highlighted that local governments are seeking a greater involvement in the state's arts ecology and to contribute to the Plan. Many local councils made submissions and councillors frequently attended town hall meetings.

South Australia is home to a vibrant and diverse arts community. It is characterised by success and diversity in a range of areas, including the theatre for young people sector, film and screen, craft and design sector, Aboriginal arts centres, the arts and disability, and the music communities.

The creation of the Adelaide Festival of the Arts, followed by a multi-venue Festival Centre, positioned Adelaide at the forefront of arts and culture in this country, and built the state's reputation as Australia's 'Festival State'. With the proliferation of arts festivals across the country, South Australia needs to do more to define its unique position as the Festival State.

Adelaide and the state now supports many arts, culture and other festivals across the annual calendar. Each provides important platforms for cultural expression, and in turn makes valuable contributions to the state's economy. They attract significant numbers of visitors from interstate, and generate increasing revenues. Across 2017 and 2018 spending generated by Adelaide's major arts festivals was up 27.7 per cent, to \$109 million.¹

While the emphasis on building a festival culture has been of immense value to the state, festivals are just one part of South Australia's arts and culture ecology. To ensure the state's diverse arts, cultural and creative sectors can thrive throughout the year, investment in festival programming needs to be part of a broader strategy to guide growth and support the objectives of the Plan.

There is evidence that some areas of cultural expression are facing particular challenges. Community consultation suggested this was particularly so for the small to medium sector and independent practitioners. Similarly, larger organisations noted that limited benefits flow to them from the strong and thriving festival presence.

A more balanced and complementary approach is required to inform investment decisions over the next five years. This will enable the creative sector – from the state cultural institutions to the maker community – to have a sustainable and optimistic future alongside the impressive and established range of festival programming.

¹ Source : Festival Adelaide website, June 10, 2019.

1.2. Relevant information

The past decade has witnessed the extraordinary proliferation of ‘festival culture’, as cities throughout the world have embraced arts festivals. More urban tourists, cheaper air travel and the widespread recognition that arts festivals build cultural reputation means every Australian capital city now invests significantly in its festival programming.

Adelaide became a UNESCO City of Music in 2015, in recognition of the breadth, depth and vibrancy of the city’s music culture. The city is now a member of the UNESCO creative cities network.

Models for space activation that have been successful include the Renew Newcastle program², in New South Wales. Another model of note occurs in Victoria where a number of philanthropists have partnered to purchase inner-city infrastructure for the medium term use of small to medium arts organisations and long-term investment gains – an excellent example of ‘impact investing’.

1.3. Opportunities

‘Arts festivals are in the ascendant.’³

Adelaide was one of the first cities to recognise the benefits of an international arts festival, however it now delivers its festival programming in a highly competitive marketplace. To remain competitive, festivals must continue to evolve. The best invite courageous experimentation, embrace diversity and challenge conventional modes of creative expression. They also provide opportunities for collaboration between local and visiting creators, and with audiences to provide unique experiences which invite new avenues for engagement. Arts festivals remain at the forefront of contemporary arts experiences, whether across immersive, visual, literary or performance-based artforms.

Today, the ecology of South Australia’s arts, cultural and creative sectors expands well beyond what happens in ‘Mad March’, when the Adelaide Festival, Adelaide Fringe and WOMAdelaide converge upon the city. To ensure this sector thrives, a more strategic approach is required to support investments in programming, audience development and touring, and that these investments enable local practitioners to have the opportunities they need to nurture and expand their careers.

From the perspective of local artists and practitioners, an over-emphasis on ‘Mad March’ as a focal point for arts and culture in South Australia is not truly representative of the cultural landscape of the state.

Taking a more balanced approach is not an ‘either-or’ scenario, which sees the Festival season diluted in favour of local arts investments. Rather, connections between festival programming and creative arts innovations need to be embraced and extended to the benefit of both metropolitan and regional audiences, and the cultural reputation of the state as a whole.

² Westbury, Marcus ‘Creating Cities’ Niche Press 2015

³ Quinn, B. (2013) Arts Festivals, Urban Tourism and Cultural Policy. In Stevenson, D. and Matthews, A. (Eds) *Culture and the City: Creativity, Tourism, Leisure*, pp. 69-84. Oxon: Routledge

A more balanced arts and creative sector can be achieved by addressing three key issues:

1.3.1. Scheduling

Adelaide's festival season, known affectionately as 'Mad March', has built the profile of the state and contributes significantly to the South Australian economy.

Festivals are diversifying across art forms. The highly successful South Australian Living Artists Festival (SALA), first established in 1998, has created an inclusive, community-based state-wide platform for the visual arts. SALA Festival has built an audience of some 800,000, and offers an 'open access' model for some 9000 artists taking part in over 700 exhibitions and events across the state annually. This demonstrates that the audience appetite for festival programming, capitalising on unusual and accessible venues, remains strong.

The 2019 Adelaide Guitar Festival's Guitars in Bars initiative, which programs 1293 artists to perform in 124 venues across Adelaide and South Australia throughout the month of July, is an excellent current example of this point.

There could be merit in the development of a state wide festival calendar to assist in creating a deeper understanding of level of activity across the state each year. This resource would help create a greater awareness of the scope of festival activity, assist in more effective coordination and collaboration, brand marketing for tourism and alignment with other areas such as food and wine and the environment.

1.3.2. Venues

The consultation highlighted the pressure on existing venues in Adelaide and in regional centres. The balance of access and commercial viability and the need for small, flexible, black box spaces to enable the independent sector to work and perform was highlighted. At the other end of the spectrum, not having a significant 'concert hall' acoustic venue was also repeatedly noted. Considering Adelaide's designation as a UNESCO City of Music, this is a notable omission.

The consultation called for development of a targeted arts infrastructure and venue activation plan to span Adelaide and regional centres for the next ten years, in close alignment and partnership with Infrastructure SA. This could include the use of school facilities and sporting facilities through a connected government approach.

This is supported by a 2017 *Arts Infrastructure Survey* by SGS Economics, which found 70 per cent of artists and arts organisations indicating that primary creation spaces do not meet their current needs, while 6 per cent did not have access to adequate presenting spaces. This Review identified the importance of fit-for-purpose spaces for artists to create their work efficiently and effectively.⁴

A state-wide venue activation plan targeting the independent and small to medium sector could be effective to activate existing properties. Through modest investment this could provide affordable work, workshop and performances spaces that in turn support the creative practice of the independent and small to medium sectors.

The small to medium theatre companies also report a lack of access to adequate rehearsal and performance space. This represents an obstacle to creating new work and ultimately building and engaging audiences throughout the year. Lack of available venues also limits

⁴ *Arts Infrastructure Survey 2017*, SGS Economics, pv.

the capacity for the sector to expand its repertoire and access national and international touring opportunities. The consultation survey confirmed this. The responses to the question ‘My organisation has adequate infrastructure (rehearsal/performance/office space) to deliver its artforms’ gave the following response.

Strongly Disagree	Disagree	Neither	Agree	Strongly agree	Can't say/not applicable	Total	Weighted Average
21.81%	30.32%	12.77%	22.87%	6.91%	5.32%	188	2.6
41	57	24	43	13	10		

The survey response was weighted average of 2.6 out of 5, one of the lowest recorded.

1.3.3. Sectoral pathways

Independent practitioners and the small to medium sector is a key strength of the local arts ecology. These artists and small arts enterprises have the potential to be strengthened and identified as a distinctive part of the cultural identity of the state. Achieving this ambition is currently constrained by funding pressures and limited venue access.

A challenge this Review faced was to define how finite resources can be prioritised to support the long-term success of the independent and small to medium sector, and ultimately the viability and health of the sector as a whole. Priority areas include:

- Establishing opportunities for career pathways and development in the sector (addressed in part in Objective 10)
- Open access funding opportunities (addressed in Objective 2)
- Support in developing business and entrepreneurial skills for individual artists (addressed in part in Objective 10)
- Audience development and public programs.

Support and future changes should also address leadership and governance, including collaboration between venues, producers, festivals and others.

Local arts practitioners also report a lack of opportunities to present and perform at major programmed (or curated) arts and culture festivals, specifically the Adelaide Festival, as well as the barrier of the open access self-funded Adelaide Fringe model. Many believe this model exposes the performer to undue risk.

1.4. Recommendations

Recommendation 1.1 Develop an annual schedule of festivals for South Australia.

The schedule should be state-wide and be inclusive of key arts and cultural festivals. This resource will assist in achieving a greater awareness of activity across the state and assist in tourism marketing, state branding, collaborative scheduling and planning new activity.

It is also suggested this calendar is linked to a similar schedule for other major events in sport, food and wine and other areas to assist in collaborative scheduling and avoiding critical clashes.

Recommendation 1.2 Develop a space activation plan for use by independent artists and the small to medium sector to optimise existing venues and spaces across Adelaide and regional centres.

To be successful this would need to be developed with local government, Infrastructure SA and the tertiary sector to identify and activate spaces for the independent sector and small to medium companies to work. Country Arts SA would need to be actively involved in regional centres.

Recommendation 1.3 Investigate options and implement a new, cost-effective, 'consortium' ticketing system to support the small to medium sector and other arts organisations (including Country Arts SA) who are not serviced by existing systems.

Recommendation 1.4 Fund a business case to assess the viability of an acoustic venue (concert hall) to serve the local music industry, as a home for the Adelaide Symphony Orchestra and Adelaide Youth Orchestras, and as a hub for music education.

Recommendation 1.5 Fund a feasibility study to identify options for the creation of a black box theatre for Adelaide.

The study should examine the issues in activating existing infrastructure, such as the Queens Theatre and other existing spaces.

Recommendation 1.6 Develop a five-year revitalisation plan of regional arts centres as creative hubs within their respective communities.

Country Arts SA will be critical in this process (addressed in Objective 3).

1.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Develop an annual schedule of festivals for South Australia	Develop a space activation plan	Investigate options and implement a new, cost-effective, 'consortium' ticketing system	Fund a business case to assess the viability of an acoustic venue	Fund a feasibility study to identify options for the creation of a black box theatre for Adelaide	Develop a five-year revitalisation plan of regional arts centres as creative hubs
To promote the role of arts and culture in enriching the lives of all South Australians						
To empower South Australia's makers and creators						
To champion Aboriginal and Torres Strait Islander arts and culture						
To amplify South Australia's signature strengths that define the character of the arts in the State						
To enhance the physical and organisational arts and culture infrastructure in South Australia						
To drive an approach in advocacy and future connected government investment in arts and culture						

2. OBJECTIVE 2

Review grant programs to ensure that existing funds and increased grant allocations are focused on supporting independent artists and organisations and a successful and sustainable ecosystem for creative enterprise.

2.1. Context

This Objective examines investments made to the arts sector by the South Australian Government, and recommends a timely transition to a new investment framework.

The Government investment is delivered through three streams – an open Grants Program assessed by expert peers from the community, operational funding administered through both multi-year and annual agreements to recurrently funded arts organisations including the statutory and other government organisations and institutions, and other project and strategic support provided in a strategic way.

2.1.1. South Australia Government investment in arts and culture

In 2018-19, the Government invested a total of \$154.9 million in South Australia's arts and culture sector. In 2018-19 a machinery of government change resulted in a redistribution of funds previously allocated through Arts South Australia to the Department for Education and the Department of Innovation and Skills. The 2018-19 allocation is as follows:

- \$140.9 million through Arts South Australia (details in 2.1.2)
- \$9.2 million through the Department of Innovation and Skills
- \$9.8 million through the Department for Education.

2.1.2. Arts South Australia

Funding for the arts and cultural sector is allocated to the Department of the Premier and Cabinet to ensure the state recognises and capitalises on artistic, cultural and economic opportunities arising from the diverse arts and cultural organisations, practitioners, events and physical assets in the state, by developing programs that build on cultural heritage and creativity, and providing financial support to the arts and cultural sector.

The Department of the Premier and Cabinet delivers funding to the State's cultural institutions and major arts organisations. The Arts and Cultural Policy and Support business unit within the Department, referred to as Arts South Australia in this document, has three key objectives. These are to:

- Ensure that South Australia capitalises on the artistic, cultural, economic and social opportunities arising from the diverse arts and cultural capabilities and activities in the state;
- Promote the growth and development of the arts sector in South Australia through the formulation and provision of advice on arts policy and strategy to the government;

- Encourage South Australia’s cultural and creative industries to thrive by providing targeted financial support to artists, arts organisations and events in South Australia.⁵

The Department of the Premier and Cabinet invests in the arts and cultural sector through:

- Operational funding to nine statutory authorities, including the North Terrace cultural institutions and ‘major makers and presenters’,⁶ and Artlab Australia, the government’s conservation service provider and business enterprise;⁷
- Operational funding to four major arts organisations;⁸
- Peer-assessed funding and grants programs that support ‘...more than 50 small to medium organisations and many thousands of individual artists...’⁹ in the fields of: literature, visual arts, public art and design, performing art, Aboriginal and Torres Strait Islander arts, arts and disability, and community cultural development;
- Strategic funding to support one-off arts based projects and initiatives;
- Funding committed to recurring arts based organisations, events and initiatives;
- Facilities maintenance and minor works;
- Corporate overheads, salaries and administrative services.

The budget allocated to the arts and cultural sector in South Australia – through Arts South Australia, and now the Department of the Premier and Cabinet – has remained consistent over recent years at about 0.83 per cent of the total state budget. The government is now facing significant budget pressure. The government reduced funding for the arts and culture in 2018-19 by \$4.9 million and has foreshadowed additional cuts growing ‘...to \$9.2 million per annum from 2021-22 which overall is a reduction of \$2.8 million in savings that remained in the forward estimates of the State budget from the previous Government.’¹⁰

5 Arts South Australia, November 2018, restructure outcome document.

6 Governed under the Public Service Act 2009: Adelaide Festival Centre Trust; Adelaide Festival Corporation; Art Gallery of South Australia; Carrick Hill Trust; South Australian Museum; State Library of South Australia; State Opera of South Australia; Country Arts SA and State Theatre Company South Australia.

7 About Arts SOUTH AUSTRALIA, <https://arts.South Australia.gov.au/content/about-arts-south-australia>

8 Adelaide Fringe, Adelaide Symphony Orchestra, Australian Dance Theatre and Tandanya National Aboriginal Cultural Institute (Tandanya).

9 About Arts SOUTH AUSTRALIA, <https://arts.South Australia.gov.au/content/about-arts-south-australia>

10 State budget papers, 2018-19

2.1.3. Operational funding – ‘Portfolio’ agencies; cultural infrastructure

In 2018-19, the portfolio of 14 major arts organisations and institutions was funded a total of \$112.6 million, representing 70 per cent of the state’s arts and culture budget.

Major Organisations	2017-18 \$'000s	2018-19 \$'000s	% Change	% of 2018-19 Funding	Notes
Adelaide Festival Centre Trust	\$24,777	\$22,114	-11%	19.6	A
Adelaide Festival Corporation	\$9,109	\$9,011	-1%	8.0	B
Adelaide Fringe	\$2,467	\$2,319	-6%	2.1	
Adelaide Symphony Orchestra	\$2,862	\$2,577	-10%	2.3	
Art Gallery of South Australia	\$13,355	\$12,669	-5%	11.3	
ArtLab	\$3,133	\$3,384	8%	3.0	C
Australian Dance Theatre	\$1,302	\$1,220	-6%	1.1	
Carrick Hill Trust	\$1,167	\$1,056	-10%	0.9	
Country Arts SA	\$5,101	\$6,536	28%	5.8	D
South Australian Museum	\$12,069	\$11,680	-3%	10.4	
State Library of South Australia	\$16,751	\$15,397	-8%	13.7	
Public Libraries Services	\$19,270	\$19,746	2%	17.5	
State Opera of South Australia	\$1,589	\$1,559	-2%	1.4	
State Theatre Company of SA	\$2,534	\$2,491	-2%	2.2	
Tandanya	\$866	\$839	-3%	0.8	
TOTAL	\$116,352	\$112,598		100	

Notes:

A: 2018-19 funding includes \$3.3 million AFC precinct project funding.

B: 2018-19 funding includes \$1.2 million additional funds for major events at the 2019 Adelaide Festival.

C: From 2019-20, Artlab is a business unit of the Department for Premier and Cabinet.

D: 2017-18 funding includes \$0.2 million for venue maintenance and electricity funding. 2018-19 funding includes \$1 million for fire safety works and \$0.5 million for regional theatres sustainment works. It also includes \$60,000 from the \$1 million per annum new funds for ‘grants to artists leading to sustainable careers’, which supported initiatives for practising artists.

2.1.4. Small to medium and independent sector

Through its Arts Organisations Grants Program, Arts South Australia provides annual and multi-year funding to small to medium arts organisations. South Australia’s small to medium arts organisations as well as its independent artists and makers are a critical part of the state’s arts ecology.

In 2019, Arts South Australia committed \$4.1 million to small to medium arts organisations through the Arts Organisations program, comprising \$3.52 million in multi-year funding (2017-19, 2018-20) and \$0.57 million in annual funding (2019). The success rate for new applications was over 90 per cent – of the ten applications for multi-year funding, nine were successful, and six of seven applications for annual funding were successful. This group of 26 funded organisations receives just 55 per cent of Arts South Australia’s peer-assessed funding in 2018-19.¹¹

¹¹ Internal budget document, Arts South Australia

Arts South Australia also manages five peer-assessed grant programs that provide funds to independent artists, artist groups and organisations to undertake projects and initiatives in the fields of literature, performing arts, and visual art, craft and design. In 2018-19, Arts South Australia’s total budget for these programs was \$3.28 million and funds were allocated as follows:

- \$1.8 million: Independent Makers and Presenters program ‘...to support skills and career development and the creation, development and presentation of new work...’;¹²
- \$0.812 million: Community Arts and Cultural Development program to ‘...provide greater community awareness of, and participation and engagement in, arts and culture’;¹³
- \$0.238 million: Aboriginal and Torres Strait Islander Arts Development program ‘...open to Aboriginal and Torres Strait Islander artists, arts workers and arts and cultural groups based in South Australia’;¹⁴
- \$0.170 million: Public Art and Design program to ‘...enhance the public experience of contemporary art and encourage professional opportunities for artists’;¹⁵
- \$0.26 million: Richard Llewellyn Deaf and Disability Arts (RLDDA) Program to support practising professional deaf and disabled artists.¹⁶

The following Survey question ‘The South Australian government is providing adequate financial support through grants and funding to artists’ found the following, being one of the lowest scores of the entire survey:

Strongly Disagree	Disagree	Neither	Agree	Strongly agree	Can’t say/not applicable	Total	Weighted Average
36.22%	35.81%	11.40%	6.79%	0.49%	9.30%	1237	1.89
448	443	141	84	6	115		

12 Independent Makers and Presenters Program, Arts SOUTH AUSTRALIA, <https://arts.South Australia.gov.au/node/6884/>
 13 Community Arts & Cultural Development Project Funding for Organisations, <https://arts.South Australia.gov.au/grants/community-arts-cultural-development-project-funding-for-organisations>
 14 Aboriginal and Torres Strait Islander Arts Development, Arts South Australia, <https://arts.South Australia.gov.au/grants/aboriginal-and-torres-strait-islander-arts-development>
 15 Public Art and Design, <https://arts.South Australia.gov.au/grants/public-art-and-design>
 16 Richard Llewellyn Deaf and Disability Arts (RLDDA), Arts SOUTH AUSTRALIA, <https://arts.South Australia.gov.au/grants/richard-llewellyn-deaf-and-disability-arts-rldda>



The Budget for the small to medium and independent sector through the Grant program is shown in the following table:

Major Organisations	2017-18 \$'000s	2018-19 \$'000s	% of 2018-19 Funding	Notes
Arts Organisations	\$3,998	\$3,577	52.1	A
Independent Makers and Presenters	\$1,114	\$1,804	26.3	B
Aboriginal and Torres Strait Islander	\$263	\$238	3.5	C
Community Arts and Culture	\$761	\$812	11.8	D
Public Art and Design	\$176	\$170	2.5	
Deaf and Disability Arts	\$241	\$260	3.8	
TOTAL	\$6,553	\$6,861	100.0	
%CHANGE		4.7%		

Notes:

A - Organisations in this program are funded on a calendar not financial year, which reveals anomalies when reported on a financial year basis. In 2019 \$4.1 million is committed to this program.

B - 2018-19 includes \$0.8 million of the \$1 million per annum of new funds committed during the election for 'grants for artists leading to sustainable careers.'

C - 2017-18 includes \$60,000 additional funding for pilot projects to support the development of the Aboriginal Arts Strategy, as well as \$25,000 for sector partnership initiatives. 2018-19 includes \$60,000 of the \$1 million per annum of new funds committed during the election for 'grants to artists leading to sustainable careers.'

D - This includes a number of sub-programs.

2.1.5. Strategic funding

Funding has been provided to a range of projects and initiatives on a strategic basis over the years.

Strategic funding or more 'discretionary' funding opportunities are common practice to complement open access grant models. Strategic funding, as the title suggests, is allocated to gaps or opportunities that arise from time to time, typically outside the normal funding cycle, such as touring, cultural diplomacy, emergency funding and sector development. This also enables Arts South Australia to broker new relationships and trial new initiatives with funded and non-funded organisations and respond to Government priorities.

From the consultation it was noted that many of those interviewed could not explain Arts South Australia's current program of strategic support, and sought greater transparency across the program.

In addition to strategic funding allocations, a suite of annual grants are made to support a range of organisations and initiatives. Such support includes to the Adelaide Youth Orchestra, the Independent Theatre Initiative, the Aboriginal and Torres Strait Islander Arts Development initiative, Festival Awards for Literature, Dream Big Festival, Spirit Festival allocation and more.

2.1.6. Department of Innovation and Skills

The Department of Innovation and Skills now maintains responsibility for a 'creative industries cluster' of contemporary music, screen and craft. This was the result of recent machinery of government changes.

In 2018-19 funds were allocated to support key sector organisations as follows:

- \$1.8 million: Contemporary Music (Music Development Office);
- \$4.76 million: South Australian Film Corporation;
- \$1.05 million: Adelaide Film Festival;
- \$0.54 million: St Paul's Creative Centre
- \$1.04 million: Jam Factory.¹⁷

This investment complements industry-wide investment programs managed by the Department of Innovation and Skills.

The funding cycles to these organisations have been confirmed as:

- Music Development Office: Not a funded organisation, a government initiative
- South Australian Film Corp: Triennial agreement
- Adelaide Film Festival: Triennial agreement
- St Pauls Creative Centre: Not a funded organisation, a government initiative
- Jam Factory: Triennial agreement

2.1.7. Department for Education

The Department for Education is responsible for funding two organisations that provide arts experiences for a younger audience. The History Trust of South Australia was also moved to the Department for Education.

In 2018-19, these organisations received a total of \$10.5 million in funding:

- \$2.58 million: Carclew Youth Arts Board
- \$1.08 million: Windmill Theatre Company
- \$6.13 million: History Trust of South Australia

The Funding cycles to these organisations have been confirmed as:

- Windmill: Triennial MOAA commencing 2018-19 with budget advised annually.
- History Trust: Triennial MOAA commencing 2018-19 with budget advised annually.
- Carclew: Four year MOAA commencing 2018-19 with budget advised annually.

¹⁷ Internal budget document, Arts SOUTH AUSTRALIA

2.1.8. Federal Government

South Australia represents seven (7) per cent of the population, and six (6) per cent of the national artist population.

South Australian artists and companies have access to Federal Government arts and culture funding programs, including through the Department of Communications and the Arts, the Australia Council for the Arts, Screen Australia, and the Department of Foreign Affairs and Trade.

The Federal Government, through the Australia Council for the Arts, contributes significantly to six organisations jointly with the State Government through the Major Performing Arts Framework and the Visual Arts and Crafts Strategy. The total of this Federal Government investment is just over \$16.5 million per annum.

Across the twelve rounds of the Australia Council for the Arts open Grants Program delivered between March 2015 and February 2019, South Australian artists submitted a total number of 862 applications being 5 per cent of the total applications received. Following peer assessment, 185 applications were approved and received a total of 8 per cent of funding, (\$6.6 million) across this period.

From the Australia Council's Four Year Funding for Arts Organisations (2017-20) category, South Australia receives ten (10) per cent of the total allocation of funds. Eleven (11) organisations are supported by this program, that receive a combined total of \$2.8 million per annum.

The Aboriginal arts centres are funded primarily by both the Federal and State Governments. Some State Government support has been allocated through the Aboriginal Affairs and Reconciliation over different time periods to support infrastructure. Federally the arts centres are supported largely through the ATSI and Department of Communications and the Arts Aboriginal language and arts program. Arts South Australia supports project activity and service provision to the Arts Centres.

Creative Partnerships Australia also runs a matched grant program for arts organisations, Plus1. Plus1 supports not-for-profit arts and cultural organisations to develop and run more effective fundraising campaigns, boost their fundraising skills and secure new backers.¹⁸

2.2. Relevant Information

The Review noted that refinement of the grants program in South Australia has been undertaken over time and is largely working effectively in its current form.

There is a worldwide trend for funding agencies to introduce more streamlined open access programs, comprising fewer categories, consistent criteria and with regular closing dates throughout the year.

Open grant programs should also be set alongside additional targeted specific strategic programs to address targeted structural issues and challenges. For example, if there is a gap in literature or other specific (and identifiable) genre or community areas, then these can be addressed over a fixed period.

The Review noted from the consultation that the sector is open for reform of the grants and strategic support program, however there were calls for appropriate consultation and a transition to new models and minimise interruption to funding support.

¹⁸ <https://www.creativepartnershipsaustralia.org.au/for-artists-and-arts-organisations/funding-programs/plus1/>

Fellowship Programs, as part of a grants model is considered by many as an effective mechanism to support artistic development, leadership, excellence and innovation in a community that benefits the individual as well as the broader creative community.

Consultation identified a perceived insecurity in recurrent funding for some arts organisations. In 2014 the Australia Council moved to a 'Four Year' cycle for the small to medium arts organisations.

Of note is the grant model reform undertaken by Arts Queensland in recent years. Arts Queensland now presents an Arts Investment program for the arts sector. A single category is presented in a 'rolling' way with closing dates every four to six weeks (approximately 10 rounds a year). The program is assessed by peer assessors with criteria across six investment principles:

- Return-driven – we invest to deliver quality artistic, cultural, social and economic returns for Queensland
- Managed risk – we invest along the spectrum of arts and cultural activity, from high to low risk, from development to growth, from new ideas to evidenced demand;
- Customers first – our investment is informed by what Queenslanders want and need;
- Diversity – we invest to capitalise on Queensland's diversity, including diverse locales, scales and forms of arts practice, heritage, cultures, ethnicities, age groups and abilities;
- Local – we invest in local arts and culture and support local decision-making;
- Transparency and accountability – we ensure our behaviour as investors is transparent and accountable, from assessing proposals to reporting on investment outcomes.¹⁹

This Review undertook limited consultation in Queensland that revealed this Investment Funding program is now well received and utilised by the sector, providing a regular flow of funds and offering flexibility in support of the sector.

Finally, the Review noted that NESTA in the UK has an Arts & Culture Finance stream which includes the world's first Arts Impact Fund and Cultural Impact Development Fund. Similar initiatives could complement a more traditional funding approach and would be particularly worthwhile for larger, expensive infrastructure projects.

We believe these concepts merit further investigation to assess potential for their adoption in South Australia.

2.3. Opportunities

Grants programs have been reviewed in several jurisdictions in recent years. It is timely to evaluate that work as part of an overall assessment of the granting and contract structure currently in place in South Australia. This will assist in devising a structure to enable strategic investment to be targeted in the best interests of the development of the South Australian creative sector.

¹⁹ <https://www.arts.qld.gov.au/aq-funding/investment-framework>

2.4. Recommendations

Recommendation 2.1. Maintain the existing Grant funding structure and assessment processes, supporting the South Australian arts sector until a new model appropriate to the South Australian community is developed and implemented in 2021.

Recommendation 2.2. Establish a 2-year Creative Fellowship program to provide support to South Australian artists and cultural leaders across all disciplines.

Recommendation 2.3. Develop an Arts Investment funding model to be implemented in 2021.

Evaluation of the Arts Queensland Government's model and grant reform in other jurisdictions need to be considered in the development of this new program.

Recommendation 2.4. Work towards harmonised application, assessment and funding timelines and grant management for the major and small to medium companies with the Federal Government and the Australia Council for the Arts.

Recommendation 2.5. Establish an Arts Organisations Collaboration Fund.

A new funding incentive to encourage collaborative projects and activities across the sector. The fund will also support the creation of new narrative content, based on the collections of the key state cultural institutions.

2.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Maintain the existing Grant funding structure and assessment processes ...	Establish a 2-year Creative Fellowship program	Develop an Arts Investment funding model to be implemented in 2021	Harmonise funding timelines and grant management with the Federal Government and Australia Council	Establish an Arts Organisations Collaboration Fund
To promote the role of arts and culture in enriching the lives of all South Australians					
To empower South Australia's makers and creators					
To champion Aboriginal and Torres Strait Islander arts and culture					
To amplify South Australia's signature strengths that define the character of the arts in the State					
To enhance the physical and organisational arts and culture infrastructure in South Australia					
To drive an approach in advocacy and future connected government investment in arts and culture					

3. OBJECTIVE 3

Consider what more we can do to meet the needs of regional and rural South Australia, local cultural activity in regional towns and centres, career pathways for artists from the regions, and access to regional touring opportunities for large and small companies.

3.1. Context

The focus of this objective is to support the development and delivery of cultural services to regional South Australia, career pathways for artists, and access to regional touring opportunities. It also recommends opportunities to enhance Country Arts SA's effectiveness and local government involvement in the arts.

No other state has an organisation with an equivalent history of effectiveness of contributing to regional cultural life. Over its twenty-five-year history, Country Arts SA has established strong strategic and operational relationships with local government, and these partnerships have significantly enhanced its value to communities across the state. A contributing factor to this success is its structure as a Statutory Authority, which provides the stability and authority of government whilst offering it a level of independence.

Most other states have regional arts organisations that provide similar services to those of Country Arts SA. However, most are membership based, and deliver devolved funding or programs on behalf of their respective state governments.

The opportunity exists to cement South Australia as a gateway to Australia, linking traditional knowledge from ancient to contemporary times through targeted investments in culturally-rich tourism experiences that connect nature-based offerings, contemporary arts, food and wine experiences, and Aboriginal history and culture.

Like much of Australia, South Australia's population is predominantly urban, with 83 per cent of the state's population based in Adelaide. This represents a higher concentration of urban dwellers than Australia as a whole, where 71 per cent is based in capital cities.²⁰

South Australia has seen relatively flat population growth in recent years – particularly since 2010, coinciding with a reduction in migration levels.²¹ Significant areas of South Australia's regions are witnessing population decline, particularly across the more remote parts of the state. The regional population as a whole is ageing, with higher representations of those aged over 65 living in regional South Australia as compared to Adelaide, which itself is generally older than the rest of Australia.²²

3.1.1. Tourism

South Australia's regions are home to many significant tourist attractions. Whilst populations are in decline in some areas, tourism is on the rise. Many tourists are looking for a 'combination experience' of food, wine, nature and local culture.

²⁰ Australian Bureau of Statistics, 2019 3218.0 - *Regional Population Growth*, Australia, 2017-18 released 27 March 2019: <http://www.abs.gov.au/ausstats/abs@.nsf/mf/3218.0>

²¹ Population growth between 2011 and 2016 was 5%. idcommunity Demographic Resources: *South Australia – Five Year Age Groups*: <https://profile.id.com.au/australia/five-year-age-groups?WebID=130>

²² idcommunity Demographic Resources: *South Australia – Five Year Age Groups*: <https://profile.id.com.au/australia/five-year-age-groups?WebID=210>

Both interstate and international tourism grew at rates of over 10 per cent in the year to December 2018.²³ With spending at \$6.8 billion in 2018, South Australia is well on the way to reaching its targeted \$8 billion in tourism spending by 2020.²⁴

Regional tourism is particularly important to the south-east of Adelaide, the Barossa, and to Port Augusta, as gateway to the Eyre Peninsula and Far North where many of South Australia's outback tourist attractions and Aboriginal communities creating art are located.

The government is also committed to promoting the state as a world leader in 'nature-based tourism' – building and promoting tourism opportunities across the State's regions.²⁵

The South Australian Tourism Commission has been engaging with Aboriginal tourism operators with a particular focus on three Aboriginal Regional Authorities; Adnyamathanha Traditional Lands Association, the Far West Coast Aboriginal Corporation and Ngarrindjeri Regional Authority.

3.1.2. Country Arts SA

Country Arts SA is the South Australian government statutory authority that produces, presents, funds and facilitates arts and cultural programs in regional South Australia. Following a restructure in 2015, Country Arts SA has expanded its role beyond being a presenter of arts experiences, to engage with communities as a producer and facilitator of arts and cultural programs and events.

South Australia's regional populations are changing, which means the way the state invests in regional arts and culture infrastructure must also change. The work of Country Arts SA remains central to the provision of arts venues, programming and funding in the regions, but legacy infrastructure must be made 'fit for purpose' to reflect the needs of contemporary communities. Effective digital infrastructure, along with a more purposeful, cross-agency approach to support resilient and creative communities in the regions, remains a critical priority.

Throughout the consultation, the Review team repeatedly heard how Country Arts SA was delivering an invaluable service. The Review also highlighted that local government in South Australia is keen to be involved in the Plan. Many local councils have arts strategies in place, but lack the resources to fully capitalise on their implementation. Country Arts SA has built and maintains excellent relationships with local councils in the regions.

Country Arts SA provides a cost-effective ticketing service, however the current system will no longer be supported beyond 2019. Country Arts SA needs a cost-effective solution that can be applied across regional South Australia. This is addressed in Objectives 1 and 5 of this Review.

While Country Arts SA programs and arts events are achieving positive impacts, issues surrounding its infrastructure are presenting significant financial challenges, and limiting its capacity to diversify income streams from a growing net deficit position (see below).

23 South Australian Tourist Commission, (2018) *Value of Tourism*: <https://tourism.sa.gov.au/research-and-statistics/south-australia/value-of-tourism>

24 It's worth noting that these figures reported by Tourism SA are contradicted by Tourism Research Australia, which reports a decline in tourism numbers and spending in SA in the year to December 2018. See Tourism Research Australia (2019): <https://www.tra.gov.au/Domestic/domestic-tourism-trends>

25 See: National Parks and Wildlife Service South Australia (2018), *Nature-based Tourism Plan*: <https://www.parks.sa.gov.au/get-involved/nature-based-tourism-plan#Nature-Based%20Tourism>

Much of the regional infrastructure owned and managed by Country Arts SA does not reflect the contemporary dynamics of arts and culture in regional South Australia. It currently manages five professional proscenium-arch theatres, as well as numerous community venues.

Country Arts SA's role managing these venues reflects its history – a statutory organisation that was formed 25 years ago by combining five Regional Cultural Trusts and their Adelaide-based management body, the Regional Cultural Council. Each of these trusts had previously been formed to manage South Australia's regional theatres.

Country Arts SA manages major venues on behalf of the Crown and other organisations including the Croatia Soccer Club in Whyalla, Whyalla Cinema, Sir Robert Helpmann Theatre in Mount Gambier, the Northern Festival Centre in Port Pirie, the Chaffey Theatre in Renmark, the Middleback Arts Centre in Whyalla Norrie, and the Hopgood Theatre in Noarlunga.

These arts venues require significant capital investment – for example \$1.5 million was required for 'critical capital works' at three regional arts venues in 2016-17 (funded in 2015-16); the impact of depreciation in the value of these venues also resulted in a net operating deficit of \$4.7 million.²⁶ Many of these, as well as smaller venues, appear to be outdated and not well used. The consultation suggested chronic underfunding of the venues.

Submissions and town hall meetings identified the importance of volunteering to ensure the viability of these centres – with calls for additional funding for (paid) gallery positions, potentially through a vehicle like the Regional Galleries Association of South Australia. Regional Galleries Association was provided with minor funding through Country Arts until 2017, with Arts SA providing a \$20k grant last financial year. It currently has no funding.

Country Arts SA has identified the need for arts venues to be made fit for purpose, transformed into 'creative hubs for contemporary communities'. It has identified Middleback Arts Centre for redevelopment 2020-21 as a priority venue for its creative hubs revitalisation program.²⁷

We will attract the investment required to bring these centres into the 21st century by keeping abreast of and utilising new technologies in order to find new ways of making and presenting arts experiences. We will work with partners who understand and appreciate the value art and the art centres bring to regional communities so that regional audiences and individuals benefit from contemporary industry practice.

– Country Arts SA submission

3.1.3. Creative Hubs

The idea of 'creative hubs' reflects the need to support more participatory and localised arts and cultural activities, which may span digital art making, singing workshops, and maker-spaces, as much as visual arts galleries and performance venues. Creative hubs could also be equipped with broadband fibre providing high speed internet access and, potentially, digital exhibition and performance opportunities.

²⁶ As reported in Country Arts South Australia Annual Report 2016-17

²⁷ Not funded at the time of the Review

Creative hubs need to be positioned as central community resources, serving to support not only artistic outcomes but also the wellbeing of residents and communities by assisting in mental health, enhancing youth engagement, addressing unemployment and facilitating stronger social cohesion. This is critical to attracting broader government investment from the regional development, health and communities portfolios.

The revitalisation of these venues would require significant capital expenditure, through targeted State and Federal partnerships. Previous funding applications to the Federal Government’s *Building Better Regions* fund to support capital upgrades to the Barossa Regional Gallery were unsuccessful on two occasions (2018 and 2019).

3.2. Relevant Information

In the consultation Survey the responses from rural and remote South Australians confirmed that ‘Participating in creative arts or cultural activities is good for my overall wellbeing’:

Strongly Disagree	Disagree	Neither	Agree	Strongly agree	Can’t say/not applicable	Total	Weighted Average
3.03%	0.87%	2.60%	21.21%	69.26%	3.03%	231	4.58
7	2	6	49	160	7		

This compares well to the Metropolitan score which achieved a weighted average of 4.69.

The *Creative Communities Partnership Program*²⁸ has demonstrated the importance of local and ‘linked’ government partnerships in supporting artists in regional communities. The initiative, established in 2014, facilitates joint funding for cultural facilitators, creative producers and curators to work with regional communities for periods of up to three years.

The program facilitates partnerships with local government, government agencies, established regional development, non-government, arts and cultural, and Aboriginal organisations that have a focus on developing community capacity. To date, the program has employed 14 arts and cultural facilitators.

The success of this initiative also demonstrates strong demand for regionally-based creative practitioners who can work to support knowledge exchange, digital storytelling and collaborative arts practices.

The Regional Centre for Culture initiative, an infrastructure investment and arts and cultural activity program, was funded by the State Government, in partnership with select regional Councils. It was delivered by Country Arts SA with focus years in 2008, 2010 and 2012 and is no longer offered. We note a similar initiative is operating successfully in Victoria.

The library network across South Australia provides an existing infrastructure that should be considered in the creation of creative community hubs.

²⁸ See Country Arts SA (2019) Creative Communities Partnership program: <https://www.countryarts.org.au/programs/community-arts-cultural-development/creative-communities-partnership-program/>

3.3. Opportunities

Country Arts SA lacks the financial resources to be able to make a number of investments in the infrastructure it supports and make it 'fit for purpose'. It lacks the resources to develop new creative hubs across the region. Creative hubs can create a valuable resource for rural and remote communities, with benefits well beyond the arts.

Country Arts SA needs to replace its ticketing platform with a cost-effective, well supported platform by the end of 2019.

3.4. Recommendations

Recommendation 3.1. Maintain Country Arts SA as a Statutory Authority to support arts and cultural development across the state. Review its funding levels to ensure it can optimise its position and deliver on its Strategic Plan.

In the Review of Country Arts SA's Funding, the Terms of Reference should consider the following areas:

- Reinstatement of the Regional Centre for Culture
- That Country Arts SA be included in the investigation of a new cost effective 'consortium' ticketing service (Addressed in Objectives 5 and 1);
- The Creative Communities Partnership Program be extended and draw investment from across government portfolio areas. The Creative Communities Partnership Program could include capital works initiatives, and matched funding from Federal programs such as *Building Better Regions* as well as state and local government investment.

Recommendation 3.2. Revitalise existing regional arts centres as creative community hubs and invest in new centres to meet the needs of the local community and elevate their role and standing.

Creative Community hubs support a range of goals across health, social inclusion and regional development, and this recommendation is linked to Objective 1 and Recommendation 1.6.

Work in this area that has been undertaken in the past needs to be acknowledged and in some areas revitalised.

Recommendation 3.3. Reform governance options for regional arts venues to ensure effective engagement with local government and alignment with local community needs.

Consideration should be given to the model of ownership and governance of the venues and the role of Country Arts SA and the local government.

3.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Maintain Country Arts SA as a Statutory Authority and review its funding	Revitalise existing regional arts centres as creative community hubs and invest in new centres as creative community hubs	Reform governance options for regional arts venues to ensure effective engagement with local government authorities and alignment with local community needs
To promote the role of arts and culture in enriching the lives of all South Australians	[Blue Box]	[Blue Box]	[Blue Box]
To empower South Australia's makers and creators	[Blue Box]	[Blue Box]	[Blue Box]
To champion Aboriginal and Torres Strait Islander arts and culture	[Blue Box]	[Blue Box]	[Blue Box]
To amplify South Australia's signature strengths that define the character of the arts in the State	[Blue Box]	[Blue Box]	[Blue Box]
To enhance the physical and organisational arts and culture infrastructure in South Australia	[Blue Box]	[Blue Box]	[Blue Box]
To drive an approach in advocacy and future connected government investment in arts and culture	[Blue Box]	[Blue Box]	[Blue Box]

4. OBJECTIVE 4

Develop and deliver on a state-wide Digital Access Plan for our irreplaceable cultural collections, – building on the work of those institutions that are already engaged in this work and helping to ensure that these collections are therefore accessible to all South Australians and the world. Digital platforms provide a window to the world for South Australia’s unique cultural heritage and we must take advantage of this opportunity to showcase ourselves.

4.1. Context

This Objective focuses on the development and delivery of a digital access plan. The challenge is the scale and expense of digitisation of the collections to provide greater access for local, national and international audiences.

South Australia’s cultural institutions hold the state’s priceless collections, including content of local, national and international significance. These institutions attract highly skilled curators, anthropologists, historians and arts leaders of the nation. They make the North Terrace Cultural Precinct a place to discover worlds past and present, real and imagined – attracting growing numbers of visitors every year.

The state’s collections are primarily housed in Adelaide, however many smaller collections are held across the state. These include those held in the extensive library network across the state and those of regional museums and historical societies.

Today’s audiences engage with collections in ways that extend well beyond the physical walls of the buildings that house them. Digital technologies allow audiences to engage, interact with and use content in new ways, through new forms of digital storytelling, creative expression and digital learning. Digital collections are both a rich learning resource and a source of creative inspiration. They extend access and awareness to national and international audiences.

It is widely recognised that digital engagement and access is critical to sustaining the relevance of cultural collections. It is not an ‘add-on’ but an integral part of what will ensure they are valued and built on for generations to come.

4.2. Relevant Information

The Commonwealth collecting institutions in the Federal government arts portfolio are facing a similar challenge to digitise their collections:

The figures for digitisation for the collections from across the commonwealth arts portfolio are²⁹:

Year	2013-14	2014-15	2015-16	2016-17	2017-18
Number	803,000	849,000	973,000	1,052,000	1,101,000
%	8.62	8.91	9.90	9.96	10.33

²⁹ Department of Communications and the Arts, 2019 Impact of our National Cultural Institutions 2017-2018: <https://www.arts.gov.au/what-we-do/museums-libraries-and-galleries/impact-our-national-cultural-institution>

The Review conducted limited research into applicable international digital models.

Research from the United Kingdom³⁰ on digital transformation for UK public libraries sets out what a national online platform (or 'single digital presence') for public libraries could look like and its use relating to existing digital systems.

The options put forward in the research include:

Deep Shared Infrastructure – a common, centralised Library Management System, procured at a UK wide level and run as a single piece of technology serving all libraries. Such interventions are rare at national level, though the Republic of Ireland has recently introduced such a system.

UK-wide Content Discovery – an aggregator at UK national level of free-to-view digital content from libraries, archives and other public collections. Examples include Gallica in France, Trove in Australia, Finna in Finland and the Digital Public Library of America in the USA.

Unified Digital Lending – a single, publicly-run service devoted to the free digital 'lending' of books and other copyright content that would otherwise only be available on a commercial basis. An example is eReolen in Denmark.

Safe Social Space – a user-led digital platform for the people who love libraries, replicating the community spaces they visit and work in as a complementary alternative to commercial social media services. No exact national equivalent currently exists, though emergent services such as Library Planet and Lit Hub offer analogies as digital places where library users and book lovers can gather and interact.

One Library Brand – an intervention to create and promote a single 'library brand' at cross-UK scale: potentially applicable in both the digital and physical realms and consistent with any of the above propositions.

The State Library of South Australia, South Australian Art Gallery, the South Australian Museum and the History Trust of South Australia all have strategies for their collections but struggle for resources. Some depend on volunteers.

Some national collaboration exists in digitisation. For example, the State Library is using Trove, a shared platform with the National Library and other State Libraries.

4.3. Opportunities

South Australia's major collecting institutions recognise the need to invest in new digital infrastructure.

Whilst there is recognition and planning for the digital future, the consultation highlighted a significant lack of resources required to enable this future.

For example, the History Trust of South Australia referenced its five year Statewide Digital Access Plan, costed at approximately \$1.5 million. Its implementation depends on volunteers. Without funding this project will not be realised within its projected five-year time-frame.

³⁰ Press Release June 6 2019 British Library. <https://www.bl.uk/press-releases/2019/june/new-research-proposes-five-options-for-a-digital-presence-in-public-libraries>

Other collecting institutions highlighted similar constraints, limiting their capacity to realise a digitally-engaged future. Major initiatives have relied on philanthropic and other one-off funding injections to support digitisation, which has led to uneven levels of investment, and limited in-house digital expertise. Without a significant boost in investment, South Australia's major collecting institutions may continue to fall behind the standards currently being achieved by other States.

4.4. Recommendations

Recommendation 4.1. Undertake a feasibility study to create a new digitisation business that provides this service to the sector across the state – along the lines of Artlab Australia, a semi-commercial, not for profit enterprise.

Recommendations 4.2. Establish a Digital Cultures Fund to support digital infrastructure and digital skills development.

A one-off injection of funds to support digital infrastructure and skills at South Australia's collecting institutions, both the majors and smaller collecting institutions.

Digital strategies should be presented to Arts South Australia with major priorities for investment, such as skills development, infrastructure, or engagement activities. The galleries, libraries and museums ('GLAM') organisations or those eligible for membership of GLAM Peak³¹, as well as smaller collecting institutions should be eligible to apply. These organisations should demonstrate how funds will ensure they are meeting their statutory or other obligations regarding collecting, preservation and access in a digital age. This could include:

Investment in improved digital infrastructure – upgrade of collections' databases, scanning/digitisation of collections' items, improved collection of 'born digital' assets.

Investment in digital curators, social media services, or other internal staff resources linked to delivering on digital strategy priorities.

Digitisation initiative to be benchmarked against the GLAM sector to ensure a percentage of collections digitised are at national standards.

It is recommended that an annual allocation of \$500,000 over a three-year period should be available to the sector to support digitisation initiatives.

Recommendation 4.3. Establish a Digital Cultures Matched Fund supporting digital learning and innovation.

Provide matched funding of up to \$250,000 per annum to support the following initiatives or activities:

- a. Creative Learning initiative: development and delivery of digital learning resources for schools. Note: This could be announced as a

³¹ The peak representative bodies of the galleries, libraries, archives and museums sectors in Australia – which began meeting in mid-2015, collaborating to enable people to access, use and build on our national collections.

matched funding initiative with the Department for Education. The opportunity also exists to align the digital collections with the school curricula, particularly for secondary schools with a focus on history, but also in design, technology, science, botany, etc.

- b. Establishment of Digital Innovation fellowships in partnership with a tertiary education provider. Provides 1 x fellowship per year to support novel use of collections, such as digital exhibitions and/or digital humanities research, in partnership with a major collecting institution or library. Researchers, educators, entrepreneurs and artists would be eligible to apply.

4.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Undertake a feasibility study to create a new digitisation business that provides this service to the sector across the state	Establish a Digital Cultures Fund to support digital infrastructure and digital skills development.	Establish a Digital Cultures Matched Fund supporting digital learning and innovation
To promote the role of arts and culture in enriching the lives of all South Australians	[Blue Box]	[Blue Box]	[Blue Box]
To empower South Australia’s makers and creators	[Blue Box]	[Blue Box]	[Blue Box]
To champion Aboriginal and Torres Strait Islander arts and culture	[Blue Box]	[Blue Box]	[Blue Box]
To amplify South Australia’s signature strengths that define the character of the arts in the State	[Blue Box]	[Blue Box]	[Blue Box]
To enhance the physical and organisational arts and culture infrastructure in South Australia	[Blue Box]	[Blue Box]	[Blue Box]
To drive an approach in advocacy and future connected government investment in arts and culture	[Blue Box]	[Blue Box]	[Blue Box]



5. OBJECTIVE 5

Ensure the Adelaide Festival Centre Trust’s newly redeveloped venues, including Her Majesty’s Theatre, enable it to take collaboration with our major performing arts companies to a new level.

5.1. Context

This Objective explores the history and position of the Adelaide Festival Centre (AFC), some issues associated with its current use, the opportunities presented by the current redevelopment and its engagement with the wider cultural community.

The AFC is a key cultural resource for the state. When it opened in 1973 it was the first multi-function arts centre in the country, and able to present a wide range of performance – grand opera, orchestral music, musicals, ballet, theatre and large-scale dance. It has been home to many ‘firsts’ in the history of the arts in Australia – including the first fully-staged Wagner *Ring Cycle* and the first Asian focused festival, *OzAsia*.

Since the opening of the AFC much has changed in its operating environment – in technology, the nature of audiences, access issues, box office, ticketing, administration and technical requirements. The Adelaide Festival Centre has adapted over its history with renovations and upgrades. The Adelaide Festival Centre Trust (AFCT) business model has also changed to ensure its financial viability, balancing funds provided by the South Australian Government with revenue from its box office.

The AFCT is undertaking redevelopment to upgrade the Plaza and forecourt areas, to be completed in 2020. The AFC’s prime position overlooking the Torrens River, adjacent to the Adelaide Convention Centre, Government House and the beautifully restored Adelaide Oval and a short walk from other significant cultural institutions on North Terrace, reinforces its place at the centre of the city’s cultural life. Its challenge will be to maintain its artistic and cultural dynamism and sustain the impressive financial viability achieved in recent years.

The AFCT is managed by a Statutory Authority managed under the *Adelaide Festival Centre Trust Act 1971*, which is responsible for encouraging and facilitating artistic, cultural and performing arts activities, as well as maintaining and improving the building and facilities of the AFC complex and Her Majesty’s Theatre. It is governed by a Board of Trustees appointed by the Government and has a commitment under its Act to deliver a broad program of activities to a diverse audience. The AFCT is expected to operate at a surplus against a fixed government subsidy.

After difficult financial times twelve years ago, the AFCT, under its current management, has achieved impressive financial stability and delivered surplus budgets for nine years at a time of significant audience diversification.

The AFCT reported a turnover of \$43 million (\$21 million in earned revenue) in 2017-18. This was lower than in previous years as during the 2017-18 financial year, the Festival Theatre was closed for six months along with Her Majesty’s Theatre which has been closed since March 2018. These closures have had a significant impact on revenues. For comparison, in 2015-16, when all venues were operating, the AFCT reported earned revenue of \$25.6 million.

The government supplemented the revenue of the AFCT in 2016-17 by \$611,000 for the revenue loss due to the closure of the car park during renovations. In 2017-18, a

total of \$7.579 million in revenue supplementation funding was paid to the AFC for loss of patronage and loss of car park revenue. \$1.351 million of revenue supplementation funding will be provided in 2019-20, as the car park continues to be closed.

In 2017-18, despite the closure of the Festival Theatre, the AFCT had 823,270 attendees to performances, exhibitions, concerts and events. Of these, 405,357 were ticketed and 417,913 were non-ticketed. For comparison, in 2015-16, when all venues were available, the AFC recorded approximately 1.07 million attendances to ticketed and non-ticketed performances and events.

The AFCT management demonstrates a commitment to working with local community groups. This includes the nine weeks of AFC hosted and produced festivals, including the *OzAsia* Festival and the Adelaide Guitar Festival. Plus active involvement in Festival Hellenika, Migrant Resource Centre, Rumi, Amazing India, Vincent and Flavia School of Dancing, Norwood Ballet Centre, public and Catholic primary schools music festivals, university graduation ceremonies, University of Adelaide musical theatre program, Department for Education and Adelaide Cabaret Festival Class of Cabaret SACE program, Elder Conservatorium, and the Chinese Welfare Association of South Australia, adding significantly to South Australia's cultural reputation.

In total the AFC's theatres had an overall occupancy rate of more than 90 per cent of available days for 2018-19.

In 1999 the AFCT established a separate entity, the Festival Centre Foundation ('the Foundation') to enable it to raise and retain funds and support its programming. The Foundation is governed by a separate Board appointed by the AFCT.

In June 2018, the Foundation's reported 2017-18 income was \$769,575. The Foundation made contributions totalling \$185,109 to the AFCT in 2017-18 for programs including Arts For All (subsidised tickets for disadvantaged children), the Adelaide Guitar Festival competition and the Steel Ryan Fellowship (supporting a placement at AFC for a trainee Aboriginal or Torres Strait Islander arts administrator) and is well on the way to raising the \$3 million contribution to the redevelopment of Her Majesty's Theatre.

In 2015 the AFCT embarked on an ambitious \$66 million program to redevelop Her Majesty's Theatre, located on Grote Street in the city centre. The AFCT purchased the land adjacent to the theatre and is developing both sites whilst retaining the historic façade and name of the theatre. The project will be completed in 2020, owned by the State and managed by the AFCT. It will be a welcome addition to the city's cultural infrastructure, with increased seating capacity and the opportunity to present major musicals.

5.1.1. Major Performing Arts Companies (MPA) and other users

Adelaide is home to three major performing arts companies – the State Theatre Company of South Australia, State Opera of South Australia and the Adelaide Symphony Orchestra. In the AFC'S Dunstan Playhouse, around 50 per cent of programming time is taken up by the MPA companies, primarily the State Theatre Company of South Australia, as well as several touring companies including The Australian Ballet, Bangarra Dance Theatre and Sydney Dance Company. The Consultation reinforced that these national companies report strong support and collaborative relationships with the AFCT.

In the Festival Theatre, around 33 per cent of programming time is utilised by the MPA companies (Australian Ballet, Adelaide Symphony Orchestra and State Opera of South Australia).

A number of other local companies (Adelaide Festival Corporation, Brink Productions, Australian Dance Theatre, Patch Theatre, Slingsby Theatre Company, Restless Dance Theatre Company and Windmill Theatre Company) utilise approximately 15-20 per cent of the AFC venues each year for their programs.

In addition, AFCT provides support each year for up to ten development projects for productions by individual artists or small to medium organisations. Two of these productions are generally brought to full production in subsequent years. This does not include the contribution to new and existing work by local artists which features in all of the AFCT's annual Festivals. The Adelaide Cabaret Festival in particular is nationally known for supporting and commissioning local artists.

5.1.2. The BASS box office

The AFCT also owns and operates the BASS ticketing agency for the arts and entertainment sector in South Australia. All BASS profits are returned to the AFCT to support cultural and community projects.

BASS was the first internet ticketing website in Australia to offer real-time sales online. It sells tickets on behalf of clients through its website, call centre, and a diverse outlet network throughout South Australia. BASS provides ticketing services for the AFCT's venues, some other arts and entertainment venues in South Australia and for a variety of outdoor events.

5.2. Relevant Information

The relationship between the AFCT and the state's MPA companies is one of competing priorities and expectations. The AFCT seeks to deliver a diverse and commercially successful annual offering, whilst the MPAs seek to maximise access to the AFC's theatres at advantageous venue hire rates.

This relationship dynamic is a feature of MPA companies in other jurisdictions. The Review team observed a largely collegiate relationship between the AFCT's management and staff and those of the MPA companies.

All parties recognised the challenges associated with their respective business models, funding levels and scheduling practices – whilst it was recognised that the current refurbishment and reopening of Her Majesty's Theatre would address some of the current tensions, the future potential of a new acoustic venue (a possible concert hall) would further alleviate the situation.

The relationships with the small to medium Adelaide-based companies were seen to be more challenging, given their frequent requirement to use the Space Theatre, which is perceived by many artists as being cost prohibitive. There are some perceptions across the sector that the AFC is difficult and expensive to work with.

5.3. Opportunities

The consultation process also revealed there is not an industry-wide understanding of the processes which determine the annual AFCT's programming. There is merit in considering ways to enable the boards and managements of both the major and small to medium companies to better understand the challenges faced by the AFC to sustain financial viability, whilst ensuring venue availability for the local arts community.

The cost of ticketing through BASS is seen to be prohibitive for some small to medium companies. The alternative box office and ticketing system being adopted internationally and across many organisations in Australia is Tessitura. This is an enterprise application used by performing arts and cultural organisations and education venues to manage ticketing, fundraising, customer relationship management, and marketing. It describes itself as 'arts enterprise software' with an initial upfront cost and operating as a member network. Minimal resources are required to run the system (addressed in Objective 1).

The Adelaide Symphony Orchestra and the State Theatre Company of South Australia both use Tessitura.

Of note, both the Adelaide Fringe Festival and Country Arts SA have separate ticketing systems. The Country Arts SA system will be unsupported after the end of 2019 and an alternative system will be required.

5.4. Recommendations

Recommendation 5.1. Establish clear protocols and procedures to enhance collaboration between the key small to medium and major companies and organisations, to ensure the best possible artistic outcomes and best use of the publicly-owned facilities, including the AFC, for the South Australian community and its arts sector.

Recommendation 5.2. Require that the Chairs and CEOs of all the resident and non-resident companies that utilise the AFC meet on a regular basis (six-monthly) to understand the scheduling and other challenges of the AFCT.

5.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Establish clear protocols and procedures to enhance collaboration between the key small to medium and major companies and organisations	Require that the Chairs and CEOs of all the resident and non-resident companies that utilise the AFC meet on a regular basis (six-monthly) to understand the scheduling and other challenges of the AFCT
To promote the role of arts and culture in enriching the lives of all South Australians		
To empower South Australia’s makers and creators		
To champion Aboriginal and Torres Strait Islander arts and culture		
To amplify South Australia’s signature strengths that define the character of the arts in the State		
To enhance the physical and organisational arts and culture infrastructure in South Australia		
To drive an approach in advocacy and future connected government investment in arts and culture		

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6. OBJECTIVE 6

Examine arts governance and encourage more resourcefulness, tasking our arts boards to have a stronger focus on diversifying funding sources, but at the same time looking to provide rolling triennial funding to arts organisations to improve their opportunities for long term planning.

6.1. Context

This objective considers recent trends in arts board practice and standards across Australia. It addresses issues of board skills and capacity in South Australia, the appropriateness of current structures and proposes ways in which these might support the development of a more connected and collaborative arts culture across the state.

The Review notes the Marshall Government's commitment to seek ways for the governance of organisations to be streamlined, free of red tape and giving companies autonomy.

South Australia currently has over 50 funded arts and cultural organisations supported by the State Government, operating under a range of governance structures. Over 200 people are currently serving on cultural sector boards. The Review acknowledges the commitment by this large group of individuals in their support of these companies.

This Review seeks to build on this success and consider ways in which the sector might work more collaboratively, develop shared strategic objectives, both with partner arts organisations, and with government, non-government organisations and industry. The leadership of boards will be critical to achieve a more connected culture. Leadership will also be required to develop new funding sources, particularly in sponsorship and philanthropy.

6.1.1. Arts Governance

Consultation indicated that appointees to arts boards, in particular government-appointed positions, received limited induction or professional development relating to their roles and responsibilities. This comes at a time of significant change in expectation for board members, requiring a more strategic focus, the ability to advocate and seek support from governments and supporters and to apply rigour in the review and oversight of the institutions operations. There is opportunity to develop arts sector board induction practices to address this.

The importance of achieving greater diversity of membership to more effectively engage with a changing society is recognised. While statistics show a satisfactory gender balance across arts organisations boards in South Australia, there is opportunity for greater cultural and ethnic diversity. There is, currently, limited Aboriginal representation. This needs to be addressed as a priority.

6.1.2. Non-Government revenues

This Review and other recent sector reports have recognised the importance for boards to diversify income streams and ultimately increase levels of self-generated funding.

Philanthropy and sponsorship have most commonly been priority areas. This priority has in turn influenced decisions about board composition. In 2003,³² the Australia Council for the Arts initiated its Artsupport program with a focus on the development of philanthropy skills across the sector. In 2011 the Federal government initiated a review into private sector support for the arts chaired by Harold Mitchell AO³³. This recommended the establishment of Creative Partnerships Australia, an independent body, funded by the Federal Government, to provide a range of support programs focused on increasing private sector support for the arts.

Creative Partnerships Australia (CPA) was launched in 2014 and brings ‘the arts, donors and business together for mutual benefit, to create a more vibrant, amities and sustainable cultural sector for the benefit of all Australians’³⁴, including support to organisations in South Australia. This has a focus on professional development and organisational (board) coaching. Creative Partnerships Australia also provides a small ‘matched funding program’, Plus 1, to encourage new philanthropic support in the arts. CPA also manages the Australian Cultural Fund which is an on-line crowd source funding platform catering to individual artists. The Fund has deductible DGR status enabling contributors to receive appropriate benefits.

Over time CPA has been subject to structural and funding changes, and this has resulted in a changed service to the sector in South Australia and a level of professional support not deemed adequate by the Review team. The CPA WA/SA Manager allocates 50% of his time (0.5FTE) to servicing SA-based clients, including spending a significant amount of time in Adelaide and regional SA, as well as liaising regularly from WA with SA-based clients by telephone and email.

The Australian Major Performing Arts Group (AMPAG) survey of non-government revenues across the arts sector reveals that organisations in South Australia perform at well below the level of other states.

State Comparisons³⁵

Summarised private sector earnings 2016 results compared to 2015

State	Earnings \$ million	Change \$ million	% Change
NSW	49.3	8.5	20.7
VIC	23	4.1	21.5
QLD	10.6	(0.3)	(2.6)
WA	9.6	0.3	3.0
SA/TAS	3.2	0.1	2.4

32 Artsupport, which is auspiced by the Australia Council, began in 2003 as a three–year joint pilot between the Australia Council and AbaF. In 2006, Artsupport began operating solely under the auspices of the Australia Council and has grown to include managers located within several state and territory arts ministries across Australia.

33 Building Support: Report of the Review of Private Sector Support for the Arts in Australia October 2011

34 Creative Partnerships Australia, 2017 <https://www.creativepartnershipsaustralia.org.au>

35 https://www.ampag.com.au/images/uploads/3455799_19_Tracking%20Changes%202017%20SNAPSHOT%20_%20FINAL%2018.8.7.pdf



*AMPAG Tracking Changes in Corporate Sponsorship and Donations 2017*³⁶ highlighted the following:

- Total private sector earnings made up 17.1 per cent of total earnings for Major Performing Arts companies
- Donations income continues to increase at a faster rate than corporate sponsorship
- South Australia and Tasmania are combined in the survey and show flat corporate sponsorship year on year. Private sector earnings in 2016 for South Australia/Tasmania were \$3.2 million. By comparison earnings in Western Australia were \$9.6 million and Queensland \$10.6 million.

While the differentials in population size and economic performance account for some of the comparatively low performance of both South Australia and Tasmania, the scale of that difference is cause for concern. Reasons contributing to this include the skills mix of board members and their recognition of fundraising as a key function, along with the adequacy of skills development available to arts and cultural boards across the state. Some organisations perform particularly well, providing evidence that links to skills of leadership.

6.1.3. South Australia's Statutory Authorities

Historically the South Australian Government has established statutory authorities for organisations to ensure preservation of their existence. Arts South Australia has nine³⁷ statutory authorities and these have been examined closely by the Review.

The Review examined the number and nature of the existing Cultural Statutory Authorities in South Australia and noted the mix of cultural collecting institutions with significant buildings and collections, the two performing arts organisations State Opera of South Australia and the State Theatre Company of South Australia – and the multi-art form Adelaide Festival Corporation. With a few exceptions, including the Queensland Theatre Company, Australian theatre and opera companies in Australia do not have a Statutory Governance structure

The government cannot influence the artistic direction of institutions that are statutory authorities. Governments do however appoint board members to the statutory authorities, often without any formal induction or direction as to the role. Governments do not have a role or influence in board appointments of other arts or cultural organisations. Statutory authorities need government approval to raise funds through debt. Foundations established under a statutory authority are constituted as registered charities.

The Review noted the existing work that had been undertaken in relation to the transfer of the State Theatre Company of South Australia to be established as a company limited by guarantee. This change has the benefit of less onerous reporting, capacity to more easily raise funds and hold reserves, and would be in line with all other similar arts organisations across the country.

The Review undertook a limited scan of other possible governance models in other regions and jurisdictions. The Smithsonian Institution in the USA has a structure worth examining.

³⁶ AMPAG *Tracking Changes in Corporate Sponsorship and Donations 2017* https://www.ampag.com.au/images/uploads/3455799_19_Tracking%20Changes%202017%20SNAPSHOT%20_%20FINAL%2018.8.7.pdf

³⁷ This does not include Statutory Authorities recently transferred from Arts South Australia

The Smithsonian Institution comprises a collection of 19 diverse museums governed by a single Board of Regents. The Institution is the world's largest museum, education and research complex '*shaping the future by preserving our heritage, discovering new knowledge, and sharing our resources with the world.*'³⁸ The Review believes that there is much to be learned from this structure particularly in relation to the South Australian collecting institutions.

6.1.4. Funding cycles

The Review considered the nature and terms of the funding arrangements for the organisations within the arts sector. Funding security was mentioned multiple times in the Consultation.

The areas of consideration included:

- Annual Funding contracts;
- Multiyear funding – rolling triennial funding agreements;
- National Cultural Funding Frameworks - Major Performing Arts (MPA) and the Visual Arts and Craft Strategy (VACS);
- Contract and assessment alignment and harmonised reporting with federal bodies;
- Artistic assessment and evaluation.

Several of these areas are referenced in Objective 2 and therefore not examined in this Objective.

6.2. Relevant Information

The Review reflected on the recent history of arts governance practice, noting that since the publication of the 1999 Inquiry into the Major Performing Arts sector known as the Nugent Report, standards across the sector have evolved significantly. Disciplines such as strategic planning, clear financial reporting, WH&S policies and procedures, performance review and audience access have since been embedded into the culture of many governing arts boards.

Nugent established that a well governed board should prepare financial and other reports with a dual purpose – for its own monitoring and for its government funding partners. The Nugent governance principles initially applied to the organisations funded by the Federal government, but over time have been incorporated across the sector including the small to medium arts organisations. Governments have also sought to harness changes in technology supporting better data collection and analysis and 'harmonised' reporting frameworks. They have also sought to address the challenge of evaluation and value of the arts to the wider community.

Twenty years since the inquiry it is noted that the impacts and reforms generated by the Nugent recommendations have brought significant stability to the organisations and ultimately enabled significant artistic development and achievement.

There is a global trend for governments and boards to develop more sophisticated evaluation and measurement that extends beyond financial performance and embrace principles including sustainability, and a range of significant social outcomes. These

³⁸ Smithsonian website 2019 <https://www.si.edu/about>

measures are valuable to underpin arguments to support government policy and investment on the one hand and support approaches to the philanthropic sector who are increasingly aware of the needs to demonstrate social impact.

6.3. Opportunities

Skills and membership diversity of cultural sector boards should be reviewed. It was noted that numerous board members had served on several boards, and that generally board members receive limited induction or professional development once appointed. It was also noted that awareness of some relevant current issues was in some instances limited, and that there were limited networking opportunities for board members to engage beyond their organisation. The consultation revealed the Chairs of the major agencies had never met formally together as a group. This group has the potential to have a significant advocacy role.

The Review believes that having a diverse range of skills and demographic mix on a Board is critical in the cultural sector, and that art form or experience relevant to the organisation is in some cases lacking. The Review found that it was an opportune time to increase the capacity of board skills in strategy and philanthropy.

Leadership of boards needs to embrace values of diversity and community relevance. Succession needs to ensure there is a flow of new members, with a fresh perspective on community relevance, engagement and effective and efficient support to the artistic objectives of a company.

The Governance model for the arts and cultural institutions of the State needs to be the subject of further review. Consideration might be given to a centralised governance model, with reference to the Smithsonian Institution.

The Australian Cultural Fund (Creative Partnerships Australia's fund-raising platform) was seen to be underutilised by the South Australian arts sector. Increased promotion and utilisation of the platform would be beneficial.

Finally, the Review found that skills and capacity development in the areas of corporate and philanthropic partnership is critical for the future. A full-time resource, delivering the services of Creative Partnerships Australia is needed and this should be addressed as a collaboration between the South Australian and Federal governments.

6.4. Recommendations

Recommendation 6.1 Establish a comprehensive Board capacity development program for South Australian arts organisations.

There is opportunity to utilise the 'thought leadership' and academic work that is taking place in cultural leadership and arts governance in South Australia and internationally.

Consideration should also be given to initiate a biennial arts governance national forum which would also be part of the broader objective of establishing Adelaide as the centre of arts training and governance leadership.

Recommendation 6.2 Source and allocate support for a full-time senior representative of Creative Partnerships Australia serving South Australia and to be based in Adelaide.

Recommendation 6.3 Undertake a five-year program to modernise and streamline the overarching governance structure for the state’s Statutory Authorities. Revisit previous work in streamlining the range of Statutory and other government arts and cultural entities to support the long-term effectiveness and efficiency of these arts organisations.

Recommendation 6.4 Increase diversity across all South Australian arts boards. In particular ensure representation of young people, and people of Aboriginal, non-English speaking background – through specific targets and via the powers existing by the government under the Statutory Authorities.

Recommendation 6.5 Promote increased utilisation of the Australian Cultural Fund run by Creative Partnerships Australia.

6.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Establish a comprehensive Board capacity development program	Source and allocate support for full-time senior representative of Creative Partnership Australia	Undertake a five year program to modernise and streamline the overarching governance structure for the state’s Statutory Authorities	Increase diversity across all South Australian arts Boards	Promote increased utilisation of the Australian Cultural Fund run by Creative Partnerships Australia
To promote the role of arts and culture in enriching the lives of all South Australians				■	
To empower South Australia’s makers and creators		■	■		■
To champion Aboriginal and Torres Strait Islander arts and culture	■	■	■	■	■
To amplify South Australia’s signature strengths that define the character of the arts in the State	■	■	■	■	■
To enhance the physical and organisational arts and culture infrastructure in South Australia					
To drive an approach in advocacy and future connected government investment in arts and culture					

7. OBJECTIVE 7

Ensure that through a whole-of-government approach, the benefits of the *Arts and Culture Plan 2019-2024* is able to be realised across the range of sectors where the community interacts with government.

7.1. Context

The focus of this Objective is to highlight opportunities for the arts sector to encourage the development of innovative cross-government partnerships, reflecting an international trend to achieve connected governments for the information age.³⁹

'... we cannot win the future with a government built on the past. We live and do business in the information age, but the organisation of government has not kept pace. Federal government agencies have grown without overall strategic planning and duplicated programs have sprung up, making it harder to reach its goals.

Now is the time to act to consolidate and reorganise the executive branch of government in a way that best serves this goal.'

President Barack Obama, March 2011

The Joyce Report⁴⁰ commissioned by the South Australian government argued that 'most importantly the review proposes to set up a strong cross-government policy process and maintain momentum in micro-economic reform, and integrate the efforts of different government agencies in support of the government's economic goals'.

The Joyce Report proposes the establishment of four policy streams to enable cross-government collaboration. Opportunities for the arts sector to align with these policy stream are explored in this Objective.

As part of government changes following the election of the Marshall Government in 2018, Arts South Australia was incorporated within the Department of the Premier and Cabinet from 1 July, 2018.

In September 2018 State Budget the Marshall Government announced its plan for a financially sustainable arts sector. Under the former government, financial savings targets (via efficiency dividends) has been progressively applied to the arts sector, in line with those applied to other government portfolios.

Up to this point however, there had been no overarching plan to achieve these financial savings. The new government outlined a sustainable plan to achieve an appropriate level of financial efficiencies in the arts sector, to provide certainty to the sector and to contribute its share to whole-of-government savings targets. Importantly, the new government decided to reduce required savings in the arts by \$2.8 million over the forward estimates.

The government achieved savings in the arts via the following measures:

- An overall efficiency target across institutions and arts programs totalling \$3 million in 2018-19, rising to \$5 million per annum (indexed) from 2019-20;

³⁹ The Review uses the terminology whole-of-government, connected government and cross-government as interchangeable terms

⁴⁰ Joyce, the Hon Steven Review of the South Australian Government's International and Interstate Engagement Bodies and Functions, 2019

- Re-focusing Arts SA from 1 January 2019 on the development and provision of advice on arts policy to the government. The corporate support and oversight functions Arts SA provided to arts institutions was incorporated within the Department of the Premier and Cabinet's existing corporate functions. This change saved \$1.9 million in 2018-19 and \$3.8 million per annum (indexed) from 2019-20.

The current Premier assumed responsibility for the Arts Portfolio, Aboriginal Affairs and Reconciliation, Multicultural Affairs and Veteran Affairs. Unlike the arts sector, these administrative units already had overarching plans to achieve their share of whole-of-government savings targets when they transferred into the department.

As a result of further machinery of government changes, screen, and segments of craft and music were transferred to the Department of Industry and Skills and Carclew Youth Arts, the History Trust of South Australia and Windmill Theatre Co were transferred to the Department for Education. At the time, there was widespread concern within the state's arts community that the changes to the machinery of government would damage the effectiveness of the sector. The Review did not find evidence to support this concern. As the implementation of these changes is recent, and monitoring of their impact for an initial three-year period is desirable.

Objective 10 of this Review proposes a number of collaboration opportunities with the Department for Education, with a focus on enhancing STEAM skills across the primary and secondary school systems.

In addition to the policy streams identified in the Joyce Report, this Review believes there are further cross-government policy opportunities aligned to the arts and culture sector.

The role of arts and culture in promoting community wellbeing is widely recognised. There is opportunity for Arts South Australia to champion initiatives with the Department for Health and Wellbeing, the Department of Human Services and the Aboriginal Affairs and Reconciliation unit within the Department of the Premier and Cabinet.

The role of arts and culture in promoting tourism is well recognised. The South Australian Tourism Commission (SATC) is partnering with and investing in arts and culture in South Australia. In 2018⁴¹ Leisure Events (Cultural, Arts and Festivals, Sporting Events, Other) in South Australia contributed 6 per cent, or \$400 million, to the Events Visitor Economy. Tourism support for arts and festivals is focused in arts events sponsorship, consumer marketing, digital marketing, public relations, strategy and insights through research. Over the last three years SATC has contributed \$8.3 million to 41 events.

From town hall meetings and submissions, the consultations highlighted that the sector expects more from the SATC. Our consultation highlighted that the SATC is effectively partnering with the sector and needs to communicate this more effectively.

Objective 6 of this Review addresses the role and function of governing boards across the arts sector, and identifies opportunities for the leadership of these boards to be more proactive in building connections across government and with the wider community.

Similar cross-agency partnerships may be considered with both federal and local government agencies. For example, the significant federal government investment in Aboriginal communities, partnership opportunities might be further developed at a state level, through Arts South Australia.

⁴¹ Source; South Australian Tourism Commission interview 2019

Noting the engagement and participation of local government representatives in this Review, partnerships might be further developed with Country Arts South Australia, SATC and the Department for Health and Wellbeing, including the Office for Ageing Well.

Noting also the important trade relationship the state government has with France to deliver the Australian Navy's new generation of submarines, there may be opportunities to enhance cultural ties with key French cultural institutions and agencies.

Successful collaboration and partnerships will depend on the establishment of new management models, requiring different leadership approaches, with the capacity to bridge organisational cultures. It requires clarity of roles and responsibilities, and clear indicators of outcomes and accountability.

Leadership from the Premier and Ministers endorsing state government cross-agency collaboration will also be critical.

7.2. Relevant information

Governments around the world are increasingly looking to cross-government collaboration, responding to the challenges of the information age. This approach recognises that complex policy problems cannot be addressed by single agencies. It also responds to increasing economic constraints, which make it increasingly problematic to continue to spend on redundant or overlapping programs, services and systems. It allows governments to streamline, simplify and improve policy-making and implementation.

The trend to deliver a collaborative government was established by the United Kingdom's Blair government in 1997. In the United States the first-term Obama government introduced the *Government Performance and Results Modernisation Act* in 2011. The Act identified 14 priority policy areas for cross-agency collaboration. One of these identified STEM education as a priority.

The Department for Innovation and Skills is currently working on a Growth Sector Strategy – Creative Industries, in partnership with the Department for Trade Tourism and Investment and the Department of the Premier and Cabinet, which on completion may represent a further opportunity for strategic alignment and cross-agency collaboration

7.3. Opportunities

The recent structural changes in South Australia pave the way for a more connected government. With key arts programs and activities in the Education, Innovation and Skills portfolios, this invites a more networked and connected approach to the delivery of services in the future.

There are significant opportunities for the arts and culture sector to contribute to the Skills and Innovation policy stream proposed in the Joyce Review.

In summary the opportunities are:

- Identifying opportunities across other policy and areas – Health, Social Services, Infrastructure, Education, Industry, Aboriginal Affairs and others;
- Developing government policy skills and experience to identify and broker relationships at a local, state and federal level. This should be the primary role of the specialist team within the arts team within the Department of the Premier and Cabinet;

- Leadership from the Premier and cabinet ministers endorsing a connected approach.
- Setting agreed targets for measurable elements of arts and culture across connected government departments;
- Communicating to the sector what departments are achieving for the sector.

7.4. Recommendations

Recommendation 7.1. Develop a whole-of-government measurement framework.

Refer Recommendation 13.1 on measurement.

Recommendation 7.2. Devise a coordinated set of Arts and Culture targets across relevant ministries to support the delivery of programs achieving social outcomes and impacts from arts and cultural focused activity.

Recommendation 7.3. Initiate a role in DPC with an arts and cultural, cross-government, departmental liaison function to assist the arts sector to connect and link across various departments and policies.

This role should be a senior role in DPC.

7.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Develop a whole-of-government measurement framework.	Devise a coordinated set of Arts and Culture targets across relevant ministries to support the delivery of programs achieving social outcomes and impacts from arts and cultural focused activity	Initiate a role in DPC with an arts and cultural, cross government, departmental liaison function to assist the arts sector connect and link across various departments and policies
To promote the role of arts and culture in enriching the lives of all South Australians	■	■	■
To empower South Australia’s makers and creators	■	■	■
To champion Aboriginal and Torres Strait Islander arts and culture	■	■	■
To amplify South Australia’s signature strengths that define the character of the arts in the State	■	■	■
To enhance the physical and organisational arts and culture infrastructure in South Australia	■	■	■
To drive an approach in advocacy and future connected government investment in arts and culture	■	■	■



8. OBJECTIVE 8

The Arts Plan will explore and consider new opportunities for new partnerships and collaborations.

8.1. Context

This Objective proposes a range of initiatives to support sustainable collaborative activity across the arts and culture sector, support connected government initiatives in the arts and to build partnerships with industry and the wider community. The initiatives should act as catalysts to collaboration.

Collaboration was a recurrent theme of consultations undertaken for this Review. Whilst there is commitment to the principle, the challenge is the translation into practice, and in particular into sustainable practice.

The Plan proposes new levels of connectivity between artists, organisations, institutions and governments. It anticipates greater collaboration and the potential to establish a new narrative for arts and culture in the state.

A new narrative for the state has potential to capture the unique story of South Australia, interpreted through its rich collections and expressions of cultural endeavour. A series of initiatives is proposed to facilitate the development of content which will create a point of difference for the arts and cultural sector in the state. This will require new models of collaboration and partnership.

A core value of the Plan is ‘Strategic Collaboration – between artists, organisations and industries, and with communities and governments to optimise resources and amplify strengths.’

There is opportunity for the South Australian arts and cultural sector to provide national and international leadership in the development and delivery of frameworks for collaborative partnerships, spanning individual creators, the small to medium sector, the large institutions, industry and wider government. This offers potential to establish a ‘point of difference’ at the commencement of this new chapter in the state’s arts and cultural endeavour.

8.2. Relevant Information

A consistent theme of the Consultation was the loss of creative potential in the state. The ability to retain talent, especially mid- and later-career artists and administrators, is critical to maintaining the cultural vitality of the state.

Consultation revealed that there is a sector perception of an imbalance of allocation between the critical components (subsectors) of the arts ecology – the individuals, small to medium, major organisations (including statutory authorities) and strategic funding.

Consultation also revealed that some in the sector did not fully understand how to initiate new partnerships and collaborations and would welcome some further discussion and training in this area.

There is evidence of the commitment to the principle of collaboration but significantly less evidence of its practice across the arts and culture sector in South Australia. A cultural shift is required, which can be supported by a number of initiatives to provide incentive and leadership.

South Australia has widespread depth and quality of human capital in the cultural sector, with a range of outstanding cultural leaders, thinkers who bring commitment and passion to their roles. Many are diligently working and achieving in their own sphere – but there is opportunity to unlock this collective intelligence and experience, to enable a more collaborative culture to thrive.

Finally, one of the roadblocks to collaboration within the sector and in general is the perception that everyone is competing for funds, audience, talent and resources.

8.3. Opportunities

To gain the benefits of collaboration, be they operational or performance/product then the following needs to be achieved:

- Encourage a stronger relationship/collaboration between arts and cultural organisations and practitioners;
- Encourage a stronger relationship/collaboration between cross-art forms;
- Encourage greater industry and corporate relationship/collaborations;
- Leadership from boards and chief executives;
- Encourage greater collaboration across government departments including Education, Health, Tourism and Industry and in some instances greater acknowledgement of what is currently occurring (e.g. South Australian Tourism Commission) as addressed in Objectives.

8.4. Recommendations

To facilitate new partnerships and collaborations, this Review makes recommendations to provide a framework for leadership initiatives across government, management, content creation and delivery. The Recommendations include a series of initiatives to stimulate greater partnership and collaboration.

Recommendation 8.1 Establish a collaborative fund, in support of the development and delivery of projects that result from collaboration between two or more creative partners.

Partnerships may span individuals and institutions, small to medium and major organisations, be cross-cultural agency collaborations or involve government agencies outside the cultural sector. A prerequisite would be that applicants are South Australian based, and are professional artists or arts organisations.

Recommendation 8.2 Initiate a program to support the development of content from across several institutions to collectively tell *The Story of South Australia*.

No other state in Australia has drawn on its unique collections to present a narrative in this way. In South Australia's case, it provides opportunity to profile internationally significant collections, and a fresh interpretative lens through which they are introduced to the public. Curatorial leadership would be required to enable this initiative.

Recommendation 8.3 Establish an *Adelaide 100 Objects Walk*.

To complement *The Story of South Australia*, an *Adelaide in 100 Objects* is proposed. This concept references a similar initiative in Edinburgh, Scotland, where 100 objects – some physical objects in the public domain or buildings, complemented by significant objects held in the collections of its fine institutions – were curated and developed as a walkable experience. The North Terrace precinct offers opportunity for a similar initiative with a focus on interpreting *The Story of Adelaide*. This could be a partnership and collaboration with the City of Adelaide.

Recommendation 8.4 Devise and develop a Cultural Ambassadors Program.

To provide leadership and direction to cross-sector collaboration, it is recommended that the government nominate Cultural Ambassadors across a range of disciplines and art form strands. These may span music, the visual arts, digital content creation, craft and dance, performing arts or theatre with the opportunity to adjust the mix to reflect the state's changing cultural priorities.

The role of Ambassadors would be to enhance communication and collaboration across the sector. As people of status and reputation, the Ambassadors would have the capacity to influence thinking, shape new directions, and encourage the boldness of ambition outlined in the *Arts and Culture Plan 2019-24*. The Ambassadors would be nominated for a two-year period, and would be required to provide a short outcomes report to the Arts Plan Advisory Group at the end of each calendar year.

8.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Establish a collaborative fund	Initiate a program to support the development of content from across several institutions to collectively tell <i>The Story of South Australia</i>	Establish an <i>Adelaide 100 Objects Walk</i>	Devise and develop a Cultural Ambassadors Program
To promote the role of arts and culture in enriching the lives of all South Australians	■	■	■	■
To empower South Australia’s makers and creators				■
To champion Aboriginal and Torres Strait Islander arts and culture	■	■	■	■
To amplify South Australia’s signature strengths that define the character of the arts in the State	■	■	■	■
To enhance the physical and organisational arts and culture infrastructure in South Australia	■	■	■	■
To drive an approach in advocacy and future connected government investment in arts and culture				■

9. OBJECTIVE 9

Aboriginal arts and culture – what are the strengths and opportunities?

‘To champion Aboriginal and Torres Strait Islanders arts and culture’ is the Goal 3 of the Arts and Culture Plan 2019-2024 and is supported by this Objective. The Review has given extra weight to this area and provided considerable detail, in recognition of its scale and importance. This includes highlighting opportunities in the Context and Relevant Information sections, and providing greater detail in the Recommendations. We acknowledge that this Objective’s recommendation would need to be agreed with the Department of the Premier and Cabinet’s Aboriginal Affairs and Reconciliation division. This work could form the basis of a separate Aboriginal and Torres Strait Islander Arts and Culture Strategy.

9.1. Context

‘The First Nations is an epic story of survival and continuity. The test of any civilisation is the longevity of that civilisation. Aboriginal Australia is the longest continuing living culture in the world and it is underpinned by arts and culture.’⁴²

The primary focus of this Objective is to achieve a sustainable, Aboriginal-led culture in South Australia to support long-term funding, vision and leadership. Its recommendations build on extensive consultations with the community for this and earlier Reviews.

Through a combination of recognising the Aboriginal voice, enabling leadership pathways, increasing the opportunities for intergenerational learning, and establishing a robust cultural infrastructure, South Australia is well positioned to optimise its current strengths and embed Aboriginal culture for the betterment and wellbeing of all the state.

The rich and diverse Aboriginal arts and culture in South Australia is recognised as critical in supporting the success and survival of Aboriginal communities. From an Aboriginal perspective, culture is integral to identity, family, kinship ties and care of country. An extensive body of evidence indicates that strong cultural foundation supports wellbeing and health outcomes, suicide prevention and support for at-risk youth, as well as supporting self-determination, education, and reconciliation in Aboriginal communities.⁴³

Strengthening and embedding culture needs to be at the heart of any Aboriginal-led arts and cultural strategy, together with long-term funding, vision and leadership. The imperative of including culture as part of the Federal Government’s Closing the Gap strategy is linked to this urgency, and South Australia has an opportunity to lead on this issue.⁴⁴

In many ways, South Australia has, historically, led the way in acknowledging the value and contribution of Aboriginal arts and culture.

In 1939, South Australia was the first state art gallery in Australia to purchase the work of an Aboriginal artist, and in 1955, the first to begin strategically collecting Aboriginal art. In 1980, the Art Gallery of South Australia (AGSA) was the first major art museum in Australia to acquire a Western Desert ‘dot’ painting and to display it in context with non-Aboriginal twentieth-century art.

⁴² Thomas, Jared Dr. William, Aboriginal and Torres Strait Islander Arts and Material Culture at the South Australian Museum. SA Arts Plan consultation, March 2019.

⁴³ The Australia Council for the Arts National Arts *Submission to the Closing the Gap Refresh*, April 2018, viewed May 2018. <https://australiacouncil.gov.au/research/closing-the-gap-submission/>

⁴⁴ Ibid.

Tandanya National Aboriginal Cultural Institute is Australia's oldest Aboriginal-owned and managed multi-arts centre, currently undergoing a timely redevelopment and repositioning of its role. In the words of artist and curator Nici Cumpston:

*'Tandanya is important as a place where regional people can go to when they are in Adelaide.'*⁴⁵

The TARNANTHI Art Fair is a signature annual event that, in addition to exposure and sales for regional and metropolitan artists, also provides opportunities for partnerships beyond visual arts, such as Our Mob and Our Young Mob exhibitions, which offer a range of professional development opportunities held in the spirit of reconciliation. Given the success of the event, currently funded through BHP Billiton, it is imperative that this event continues.

The State is home to nine ATSI arts centres, including seven in the Anangu Pitjantjatjara Yankunytjatjara (APY) Lands and one in Ceduna. Alongside the strong presence of visual arts, the state's first Indigenous Screen Strategy was developed in 2015. A number of Aboriginal initiatives developed with award-winning films written and directed in South Australia, including *Tracker* directed by Rolf de Heer and starring leading Aboriginal actor David Gulpilil, and the world premiere of *Samson and Delilah* by Warwick Thornton. From the perspective of literature, Yankunytjatjara woman Ali Cobby Eckermann is one of Australia's preeminent poets, and was the 2017 recipient of Yale University's Windham Campbell Prize in Poetry, worth US\$165,000.

Above all, South Australia is home to the largest ATSI collection in the world. As mentioned in Objective 4 the preeminence of the South Australia Museum's Australian Aboriginal Material Cultures Collection, as well as the outstanding art collection of the AGSA, and its representation at the proposed Aboriginal Arts and Cultures Gallery on Lot Fourteen has the potential for South Australia to become the gateway – and lead the way – in showcasing Aboriginal arts and culture for all of Australia.

Such a collection, when researched, curated and narrated from an Aboriginal standpoint, yet harnessing Western methodology, archival processes, and digital opportunities, could become a formidable cultural asset of global significance. By adopting a collaborative Aboriginal and Western approach, methodologies, archival processes and digital opportunities, the new gallery has the potential to shift perspectives, empower Aboriginal people and provide rich content for future academic, cultural and artistic works.

9.2. Relevant information

This Review utilised the significant consultations undertaken in the development of a proposed 2017 Aboriginal Arts Strategy (AAS), in addition to the subsequent draft report, *Investing in Aboriginal life through Arts and Culture*.⁴⁶ This Aboriginal-led consultation process covered a wide range of art forms and was robust in terms of its representation and issues raised.

The 2019 consultation built upon the AAS through one-on-one interviews and town hall meetings, as well as an on-site visit to Alice Springs. In addition, submissions to the Plan are referenced. Participation in the Plan's survey by people identifying as Aboriginal was 50 out of 1843 respondents, with 73 per cent of the total respondents saying they had 'the opportunity to learn about First Nations cultures through arts events'.⁴⁷

⁴⁵ Cumpston, Nici. Interview, March 2019.

⁴⁶ ATSI Arts Development 2017 ATSI Strategic Plan, *Aboriginal Arts Strategy draft 2018 (AAS)*, and *ATSI High Level Summary of Aboriginal Arts Sector Forums* (online version), 2017.

⁴⁷ Survey for the Arts Plan 2019-24. See Appendix A.

Throughout the AAS consultations, and reiterated during the meetings in 2019, is the importance of:

‘giving people a voice’.

– Contributor, AAS 2017⁴⁸

During the 2017 consultations and again in 2019, frustration was voiced about a current lack of Aboriginal representation in Arts South Australia, and an overall lack of representation in non-Aboriginal arts organisations in the State.

‘There are [always] changes in Arts SA. There’s no consistency. It’s unpredictable.’⁴⁹

Furthermore, the sector has ‘consultation fatigue’ as a result of reviews, consultation and work over a number of years which have then not been adequately implemented. In particular the AAS report has remained in draft format. It is critical that there is an endorsement and decisive implementation following this strategy and review work.

While the state has a high number of young Aboriginal people in tertiary education, the majority of these (around 300) are in medicine and nursing. They are under-represented in arts and culture education because ATSI people do not see career pathways and a sustainable future in the arts.⁵⁰

In addition, participants raised the importance of the broader non-Aboriginal community in becoming more culturally aware about Aboriginal issues, history, diversity, stories and people, and to recognise this cultural value to the State.⁵¹

9.2.1. The role of Reconciliation Action Plans

AAS raised the significance of Reconciliation Action Plans (RAP) for the arts and cultural sector. RAPs can assist in setting goals for higher employment for ATSI staff, influence decision-making, engender respect and make an active, measurable commitment to the world’s oldest continuous living cultures.

Currently, the State’s Department of the Premier and Cabinet is formalising its RAP, in parallel with a ‘whole-of-government’ RAP, deliverable under the Aboriginal Affairs Action Plan. The State government has a clear opportunity to:

‘lead by example and influence other organisations and state authorities to follow.’

– Contributor, AAS 2017⁵²

In addition to this leadership opportunity, the 2017 consultations repeatedly requested to build RAPs into funding agreements, encourage RAPs at universities and tertiary institutions where RAPs currently do not exist, and further harness the existing South Australian Tourism Commission RAP. Most significantly, there were repeated requests that arts organisations across the State also establish RAPs.

‘Reconciliation Action Plans are needed at Universities – some only have statements and not all have even that.’

– Contributor, AAS 2017⁵³

48 ATSI High Level Summary of Aboriginal Arts Sector Forums. Contributor AAS, p.33.

49 Alice Springs Aboriginal consultation, April 2019.

50 ATSI High Level Summary of Aboriginal Arts Sector Forums. Contributor AAS, p. 20.

51 Ibid.

52 Ibid., p. 12.

53 Ibid., p. 9.

The University of South Australia has led the way by adopting a RAP in 2014. However, the majority of other South Australian educational institutions have not followed suit or are only now developing a RAP.

A similar pattern exists in South Australian arts organisations. As of 25 June 2019, only Country Arts SA, Carclew, the Art Gallery of South Australia and the SA Film Corporation are listed as having RAPs on the Reconciliation Australia website.⁵⁴ The Review notes Statutory Organisations are strongly encouraged to have RAP's as part of the conditions of their funding. However, they are not required to work with Reconciliation Australia to develop and endorse them.

In order for RAPs to be effective, fiscal accountability is encouraged as well as active leadership on the issue.

9.3. Recommendations

While acknowledging specific challenges within the Aboriginal sector, the recommendations in this objective take a strengths-based approach that emphasise the inherent strength, resilience and creativity in communities.⁵⁵ Wherever possible the recommendations aim to champion initiatives that currently exist and build upon these foundations. These recommendations extend those in Goal 3 of the Plan, with specific objectives. In order for Aboriginal arts and culture to thrive, any approach must be Aboriginal-led, strategically mapped, and executed in a timely manner.

Recommendation 9.1 Commit to the release of an Aboriginal and Torres Strait Islander Arts Strategy for South Australia that captures the previous consultation and strategy work undertaken for this purpose.

Recommendation 9.2 Build leadership pathways and cultural career pathways and opportunities.

In addition to the current artist residencies and fellowships existing in South Australia, run by a range of organisations, in particular, the partnership project between Catholic Education South Australia (CESA) and Carclew, further work needs to extend these pathways and opportunities. The aim is to establish a multi-tiered leadership pathway to build capacity and training for all arts and cultural practitioners within the Aboriginal sector.

The focus should include:

- The development of sustainable leadership pathways, traineeships, cultural cadetships for ATSI peoples within arts organisations, tertiary and other educational settings. These traineeships need to go beyond supporting artists, but also producers, arts administrators, Aboriginal curators, lighting and set designers and stage managers, to build out the wider Aboriginal arts and culture ecosystem. Such opportunities also need to exist within remote arts centres where volunteers are often utilised as staff and are not remunerated.

⁵⁴ Viewed, June 25, 2019. <https://www.reconciliation.org.au/reconciliation-action-plans/who-has-a-rap/>

⁵⁵ See the critical work by the Lowitja Institute. For example, Fogarty W., Lovell M., Langenberg J., Heron, M-J. 'Deficit discourse and strengths-based Approaches: Changing the narrative of Aboriginal and Torres Strait Islander health and wellbeing', National Centre for Indigenous Studies, ANU. Viewed at My 29, https://ncis.anu.edu.au/_lib/doc/ddih/Deficit_Discourse_and_Strengths-based_Approaches_FINAL_WEB.pdf

- Current pathways exist in some artforms, such as music (Northern Sound System), dance (Kurruru Arts Youth Performing Arts) but through more investment, any impact could be hugely amplified. There is an opportunity to build more employment pathways and infrastructure in dance and theatre (traditional and contemporary) and in literature through bodies such as Writers SA, which has a dedicated group of Aboriginal writers, emerging and established, yet minimal funding.⁵⁶
- South Australian arts organisations can actively contribute towards meeting Aboriginal employment targets, as identified as critical in AAS. A key part of this strategy is to ensure that there are pathways for Aboriginal people to lead at executive and board level across all arts organisations, and that this is a priority over the next five years.
- Career pathways for Aboriginal artists need to be holistic. This is especially the case for regional and remote artists who visit metropolitan regions to exhibit their work. Pathways need to address the wellbeing and mental health of artists. The wellbeing of artists, both in community and within Adelaide, 'is often vastly overlooked – how can artists engage if health and housing is poor?' This is especially critical in the APY Lands, where artists have complained about working in 'sweat shop'-style conditions.⁵⁷
- In the APY lands succession planning is a key element of creating sustainable pathways. A part of this is the important need to create more opportunities for Aboriginal administrators and managers in arts centres, as currently this role is often filled by non-Aboriginal individuals.⁵⁸
- Career pathways also need to address the business, marketing and promotion side of being an artist, in addition to skills development, intellectual property, advocacy, and research.
- Given the high usage of social media in Aboriginal communities, training must include a digital component, with guidance on how to best harness social media, new forms of online sponsorship, affiliate marketing and entrepreneurial opportunities for creators. This is currently not adequately served across the Aboriginal arts sector.
- In relation to State owned and private collections, including those developed and held in remote Aboriginal communities, significant opportunities exist for Aboriginal researchers, writers, curators, registrars, and conservators. For example, ANKA (Association of Northern, Kimberley and Arnhem Aboriginal Artists) has achieved some notable achievements in this important area of work.

⁵⁶ Alice, Jessica. Director, Writers SA, consultation March 2019.

⁵⁷ ATSI *High Level Summary of Aboriginal Arts Sector Forums*. Contributor AAS, p. 30.

⁵⁸ Alice Springs Aboriginal consultation, April 2019.

Recommendation 9.3 Focus on developing significant intergenerational learning and inter-cultural initiatives.

The value of intergenerational programs through art centres, community-based learning initiatives, language revival programs, in schools and in tertiary education is critical in maintaining culture. The value of these programs can be amplified through effective digital strategies.

This recommendation should include:

Language revival

- There are forty-six Aboriginal languages in South Australia, however many are not represented, yet there is an ambition for South Australian languages to be further developed and profiled through South Australian Aboriginal arts practice, presentation and promotion. Like arts centres, Aboriginal language centres have the potential to become community hubs and cultural meeting places.
- Further funding is required to build on the successful programs already in existence. These include Carclew Youth Arts, currently supported by the Department of State Development, and the Catholic Education South Australia (CESA) Aboriginal and Torres Strait Islander Education Team. CESA has developed and implemented a Cultural Artist in Residence program in Catholic Schools across the state. This program also enhances intercultural understanding and respect in school communities, as well as improving the learning and wellbeing of Aboriginal students and their families.
- In remote arts centres there is a need for translators: both in terms of training and ongoing remuneration, or a 'translator in residence' scheme. Adequate translation between Aboriginal employees and artists, and non-Aboriginal employees also help resolve governance issues.
- Language courses can be held at TAFE and at tertiary level, with a provision for more opportunities for students from remote communities to gain a tertiary education.

Storytelling: maintaining culture to keep communities strong

- Storytelling is an integral part of intergenerational learning and a millennia-old way of passing on culture. Ownership of stories within Aboriginal culture are closely linked to kinship and country, and as such need to be treated with sensitivity in a culturally safe manner. Furthermore, stories and narratives are vital in honest conversations about the past, truth-telling and reconciliation.
- In the 2017 AAS consultations, Aboriginal artists expressed their frustration at their stories not being honoured, and at the same time voiced grief and pain about the ongoing experience of colonialism and exclusion.
- The 2019 consultation heard that non-Aboriginal practitioners wish to know more about Aboriginal culture, and how to better support their fellow Aboriginal artists. An Aboriginal-led strategy could address this issue.

- Research needs to be undertaken to develop the appropriate mechanism to create a story and cultural keeping-place or centre. This could be part of the Lot Fourteen initiative. Such a centre could also provide clear guidelines⁵⁹ on respecting Aboriginal stories, knowledge and intellectual property.
- The South Australia Film Corporation could implement a program modelled on Western Australia's successful Indigenous Community Stories, 'oral-history-on-film' program and archive. This has been a 10-year program recording 100 individual and community stories on film that are now depositing with AIATSIS, as well as the State archives. The program draws on the extensive oral traditions of Aboriginal people and stimulates significant skills development, job opportunities and career pathways.
- Intergenerational learning is especially important for young people in remote communities to learn from Elders, and access Western technologies and systems to conserve material cultures, participate in the broader cultural economy and programs, to achieve accreditation leading to the creation of strong career pathways.

Aboriginal-led and managed database to inform and educate

- During the 2017 consultations, there were repeated calls for a database of South Australian artists, an inventory of their works and how to buy their works, as well as a 'one-stop shop' for topics ranging from whom to ask to do a 'Welcome to Country', to how to hire local dance groups, work with Aboriginal writers and editors, and learn about disability initiatives for Aboriginal arts practitioners.
- Such a database could provide employment for Aboriginal cultural advisors. It would require an Aboriginal dedicated project officer, or team, and a digital strategy in order to disseminate material more widely. Such a database could showcase successful stories of Aboriginal arts practitioners, harnessing social media channels to encourage a national and international conversation and showcase South Australian arts and culture.
- Before advancing on this topic, further research and consultation with the Aboriginal community to decide the best approach for the database, digital strategy and best place where it should be located is encouraged.

Digitisation of the SA Museum Australian Material Cultures Collection

- Investment in the digitisation of the South Australian Museum Australian Material Cultures Collection needs to be built on, to support two-way communications between North Terrace and Aboriginal communities across Australia and the South Pacific. Priority to be placed on improving digital connectivity to remote communities as part of the broader set of strategies to support Aboriginal arts and culture. Ara Irititja⁶⁰ has developed software which is both culturally framed and travels into remote communities.

⁵⁹ ATSI High Level Summary of Aboriginal Arts Sector Forums. Contributor AAS, p. 19

⁶⁰ https://www.iriritja.com/the_archive/software_licence.html

Recommendation 9.4 Stimulate the development of Aboriginal cultural infrastructure for practice, learning and community.

First Nations-owned and run cultural infrastructure was identified as a priority in the AAS. There is a danger that growing interest in the presentation of Aboriginal arts and culture, through cultural tourism and visual arts, overwhelms support for genuine cultural practices, including artisan skills and knowledge.

'We need investment in Aboriginal creative practice to create genuine experiences.'

– Contributor, AAS 2017

Aboriginal arts infrastructure in regional South Australia must ensure Aboriginal culture can thrive, continuing to enrich and enhance the knowledge of young generations, who themselves will be custodians of their culture for future generations. Furthermore, Aboriginal practitioners need to feel respected, welcome and culturally safe in their environment.

This cultural infrastructure strategy would complement the existing nine art centres in the state and the plans for Lot Fourteen. Further work is required to understand the best approach from an Aboriginal-led perspective.

There is a great opportunity to support communities and existing activity through the development and establishment of a network of arts centres, with at least one 'leading' centre to become a beacon in the region. Locations for the leading centre include Coober Pedy, Oodnadatta, Marree, Roxby Downs and Port Augusta.

Cultural activities on country underpin Aboriginal culture and storytelling, strengthen connection to country, and improve health and wellbeing – emotional, physical, and spiritual. Aboriginal people still face access and opportunity barriers to visit significant sites, whether remote or closer to major cities, for ritual, ceremony and storytelling. Therefore, a critical part of any cultural infrastructure development is funding and opportunities for communities and families to spend time on country.

This recommendation should include:

- Investment priority around Aboriginal regional infrastructure to be linked to the government's Aboriginal arts and cultural strategy. This is a clear instance where regional community resilience meets a wide number of government agency priorities.
- Investment in new Aboriginal-owned and run regional arts centres. A major facility at Port Augusta is proposed in the AAS as the gateway to the Eyre Peninsula, Far North and APY lands where many of South Australia's outback tourist attractions and Aboriginal communities are located. The 2019 Port Augusta submission for the 2019 Plan outlines an ambitious, digital-focused multi-art form precinct that would create employment for Aboriginal regional program managers and support staff.

- Further research and consultation are required to establish the optimal regional location and the strategy of how it could best work with the proposed metropolitan cultural centre at Lot Fourteen.

Recommendation 9.5 Develop regional and remote art centres as community hubs.

Art centres are pivotal in regional and remote communities. While the majority of the funding for these centres is Federal, the role of the State Government for the service organisations and individual projects is vitally important.

Regional arts centres provide career pathways for artists and the space for work to be exhibited, as well as playing a significant role for intergenerational learning and cultural support. Arts centres are also ad hoc cultural and artefact keeping-places where artefact repatriation and sacred artefacts are often housed in a community.

Arts centres are expected 'to fulfil a range of social and community services outside of the realm of other arts organisations'.⁶¹

At present there are two peak body service organisations in South Australia: Ku Arts and the APY Art Centre Collective (the Collective).

Ku Arts (Anḡanguku Arts and Cultural Aboriginal Corporation) is the South Australian body for Aboriginal artists and art centres. Its focus is on supporting the wider network of state arts centres, providing advocacy, support services, creative skills and professional development opportunities for artists and arts workers across all stages of their careers. In addition, through its Statewide Indigenous Community Arts Development (SICAD) program, Ku Arts works with Aboriginal artists living in regional and remote areas of South Australia outside of the APY, assisting some 150 artists each year.

The APY Collective is focused more on creating and exploring new markets, effective sales, marketing and the commercial output for its artists and their work. The Collective established the first APY Gallery in Sydney in March 2018 and opened a gallery in Adelaide in 2019, with funding support from the South Australian Government. The Collective also lead collaborative regional artistic projects, such as the acclaimed Kulata Tjuta project.

Other peak bodies including Desarts and ANKAAA, who are not based in South Australia provide support for artists. Desarts, based in Alice Springs, provides advocacy, business support, training and employment, promotion and marketing to its members, some of whom are in South Australia. ANKAAA, based in Darwin, is led by a strong Aboriginal board and has strong relationships with community, government and industry partners. ANKAAA has six work areas – training, day-to-day resourcing and supporting, referral and networking, advocacy and lobbying as well as marketing and promotion.

⁶¹ Ku Arts Submission to First Nations Art and Culture in the South Australian Arts Plan 2019-24, p. 2.

This recommendation should include:

- Evolve the existing model of support to regional arts centres with increased funding to existing current programs and service organisations to assist in training development and capacity building;
- Where appropriate, develop the role of arts centres as keeping places for artefacts and work with Aboriginal communities on a strategy of how best to ensure these collections are maintained and cared for in a culturally appropriate way;
- As identified in the AAS, develop youth arts practices in the APY Lands in partnership with Ku Arts, Carclew, Country Arts SA, the Department for Education and Child Development and SA Health;
- Clarify the strategic focus and role of each service organisation to avoid tension or duplication, and reinforce the role that each plays in supporting the sector;
- Following the recent State support to the APY Collective, build on this through strengthening the broader network to enable marketing, selling and promotion of quality Aboriginal work;
- The AAS and the APY Collective highlight the opportunity for South Australia to take a national leadership role on authentic art and culture, so the state becomes known for quality and ethically traded Aboriginal art and cultural experiences. This would address the issue of 'fake art' and carpetbaggers.

*'There is an opportunity for South Australia to be a global leader in using such technology to support best practice in the ethical sale, promotion and marketing of Aboriginal art.'*⁶²

Through a combination of recognising the Aboriginal voice, enabling leadership pathways, increasing the opportunities for intergenerational learning, and establishing a robust cultural infrastructure, South Australia is well-positioned to optimise its current strengths and embed Aboriginal culture for the betterment and wellbeing of all the State.

62 Submission from the APY Art Centre Collective for South Australian Arts Plan 2019-24, p. 4.

9.4. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Commit to the release of an Aboriginal and Torres Strait Arts Strategy for South Australia	Build leadership pathways and cultural career pathways and opportunities	Focus on developing significant intergenerational learning and inter-cultural initiatives	Stimulate the development of Aboriginal cultural infrastructure for practice, learning and community	Develop regional and remote art centres as community hubs
To promote the role of arts and culture in enriching the lives of all South Australians					
To empower South Australia’s makers and creators					
To champion Aboriginal and Torres Strait Islander arts and culture					
To amplify South Australia’s signature strengths that define the character of the arts in the State					
To enhance the physical and organisational arts and culture infrastructure in South Australia					
To drive an approach in advocacy and future connected government investment in arts and culture					

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10. OBJECTIVE 10

Education in the arts – new learning opportunities.

10.1. Context

The Review recognises that the development of education and learning strategies for South Australia is beyond its scope, and would be appropriately undertaken by the Department for Education in consultation with, amongst others, the universities, the Department of Innovation and Skills and industry groups.

Education and learning emerged as consistent themes in consultations for this Review. Reflecting this focus an additional Objective has been included, to provide a high level overview of the education and learning environment in South Australia and its potential to support the skills required for the current and future generations of learners to contribute to a rapidly changing world. This Objective contains an overview of the strong themes and issues raised during this Review's consultation.

The Review team acknowledges the contributions of Arts South Australia, the university and TAFE sectors, and the key individuals who have earlier addressed the opportunities to more effectively link the state's cultural resources to those of the education sector.

Education is not just for the young, it's for all. Giving our future leaders and society the right skills is critical for a successful society and starts at home and at school and continues right throughout life.

Educators around the world are focusing on curricula that support the development of what are regarded as '21st century learning skills': critical thinking, creative thinking, communication, collaboration and teamwork, and personal and social skills.

At the same time there is recognition that a focus on STEM – science, technology, engineering and mathematics – should to be broadened to STEAM, to include the arts and creativity.

10.1.1. Consultation Observations

Virtually all funded arts organisations and institutions present formal education programs. This is complemented by informal, or 'self-directed' learning, which is a dimension of visits to the collecting institutions and attendance at performances and associated programs and activities. There is frequently an inter-generational dimension to this learning.

The strength and uniqueness of the small cluster of youth arts organisations focusing on and delivering arts for young audiences, and in particular theatre, in South Australia was noted and celebrated in many discussions – 'world class' was the term often used.

A number of consultations suggested that in recent times there has been a deterioration of arts training standards within the schools and tertiary systems. The Review did not explore this suggestion further.

Many felt that opportunity exists for Adelaide to be repositioned as the 'arts training heart' of Australia. That many of the component parts are present – but which need support and activation – was a common theme in the consultation.

Particularly noted in Regional consultations is the availability and benefits of lifelong learning, and the opportunities for this to be enhanced, potentially in partnership with Country Arts SA.

10.1.2. Arts South Australia Restructure

With the restructure of Arts South Australia in 2018, three organisations previously funded through Arts South Australia were transferred to the Education portfolio, with their existing budget allocations. Of these, the Department for Education is responsible for funding two key organisations that provide arts experiences and arts education for young audiences.

In 2017-18, these organisations received a total of \$4.0 million in funding:

- \$2.6 million: Carclew Youth Arts Board
- \$1.4 million: Windmill Theatre Company.

Budgets for the three agencies were subsequently reduced by \$472,000 in the 2019-20 state budget. The Consultation indicated a residual level of sector concern relating to the justification for the relocation of the three agencies, and the benefits this may offer. The reduction in budgets for 2019-20 has not ameliorated this residual concern.

10.1.3. Primary and Secondary Education

The Department for Education has a focus on music in primary and secondary schools. No other art forms are similarly identified as priority areas. The government's Music Education Strategy 2019-2029 is aligned with the UNESCO City of Music status for Adelaide, and sets out South Australia's long-term vision that all children and young people throughout their education have access to high-quality music education. The success of the strategy will depend on the availability of specialist teachers.

Consultations consistently referenced the emphasis on STEM in the curriculum and the need for this to be complemented by the inclusion of creative learning disciplines – for STEM to become STEAM. The consultation consistently advocated that this would provide a more rounded education for students and employment for the sector.

'With STEAM, we can challenge preconceptions that learning areas are separate, and move past the 'I'm good at maths and science, so I'm not creative' way of thinking. This will change the way we see STEM problems and create a new way of thinking that is engaging, multifaceted and inclusive, with diversity of representation and thought.'

– Professor David Eagleman, neuroscientist and author from Stanford University

Creative and critical thinking are fundamental skills for future generations. The 2015 OECD study on PISA (Program for International Student Assessment)⁶³ reports that over the period 2006-15, science literacy in South Australia has witnessed a slight decline in ranking, whilst mathematics literacy and reading literacy were stable over this time period.

The recommendation that the digitisation of the collections of the key state cultural institutions be significantly expanded (at Objective 4) provides opportunity for these resources to be aligned with curriculum strands at primary and secondary levels. History, science, design and innovation are examples of content strands to be explored.

⁶³ Thomson, Sue, Lisa de Bortoli, Catherine Underwood. PISA: 2015 A First Look at Australia's Results (Australian Council for Educational Research, 2015) <https://research.acer.edu.au/cgi/viewcontent.cgi?referer=https://www.google.com/&httpsredir=1&article=1021&context=ozpisa>

The state has no specialist secondary school focusing on creative disciplines. Examples in other states include the Victorian College of the Arts Secondary School in Melbourne, Newtown High School for the Performing Arts in Sydney and the John Curtin High School in Perth. Consideration might be given in the recommended further review to the establishment of a creative arts/performing arts high school in Adelaide. Springbank Secondary College may represent such an opportunity.

10.1.4. Tertiary Education

South Australia is fortunate to have leading tertiary institutions – the University of Adelaide, University of South Australia and the Flinders University. The *Times Higher Education* Rankings for these Universities are:

University	Times Ranking – Australia	Times Ranking – World
University of Adelaide	8	135
University of South Australia	=10	201-250
Flinders University	=15	251-300

All three have campuses in Adelaide, with University of South Australia having campuses in Whyalla and Mount Gambier.

The range of creative arts programs offered by each of the universities is impressively diverse and complementary. Each provides courses at degree, post-graduate and doctoral level, covering a broad range of creative and performing arts disciplines. A number of the programs align with broader creative industry disciplines such as design and digital media.

The Universities house and curate significant visual art, sculpture, scientific and Aboriginal artefact collections.

Samstag, part of the University of South Australia, located on North Terrace provides an opportunity to more effectively contribute to the vitality of this cultural precinct.

The Elder Conservatorium at the University of Adelaide provides specialist music courses and hosts a Centre for Aboriginal Music Studies.

10.1.5. TAFE

Complementing the universities is the TAFE sector, which is experiencing a revitalisation led by its new chair. The Review believes that there are significant opportunities for the TAFE sector to complement courses offered by the state's three universities.

The TAFE has locations across the State, and offers courses in arts and design at award level, short courses, on-line and apprenticeships. The consultations highlighted that the facilities of TAFE are underutilised, particularly at the Adelaide College of the Arts (AC Arts).

AC Arts is under the TAFE umbrella and has long been a hub of tertiary arts education in the state. Centrally located in Light Square, AC Arts is one of the last tertiary institutions housing the study of performing arts, visual arts and design in one building in Australia.

AC Arts specialist facilities include:

- Light Square Gallery – a purpose-built exhibition space for visual arts;

- Specialised studios for ceramics, drawing, jewellery, painting, photography, printmaking, sculpture, game art, CGI and visual effects;
- Two theatres, green room, control room, wardrobe maintenance room, suite of production offices, lighting studio, design studios, set construction, props manufacture and scenic art workshops, costume manufacture workrooms;
- Specialised computer, design and music suites;
- Industry-standard digital production equipment including cameras, lights and sound-recording gear and accessories, a portable television studio with video and audio mixing, and a sound recording studio and mixing facilities. Editing suites with industry-standard software suited to film and television pre- and post-production.

There has been valuable earlier consideration of the opportunity for the AC Arts to be developed as the Adelaide Centre of the Arts. A 2009 study by Robyn Archer imagined the potential for it to become a market-leading centre, able to attract local, national and international students. This would build on the industry and professional arts environment for performing arts that is already well established.

The study recommended that the Adelaide Centre for the Arts remain within the TAFE system, rather than constructing a blueprint for secession or amalgamation. It advised that AC Arts move towards an arts education and training model much closer to that of the Victoria College of the Arts (VCA). These two (AC Arts and VCA) are the last multi-genre arts training institutions contained discreetly on one campus. The Review team believes that is opportunity to revisit the study undertaken a decade ago by Robyn Archer.

10.1.6. Lifelong learning

The consultation Survey asked ‘Participating in arts, culture and creativity is seen as being integral to a good education.’

Strongly Disagree	Disagree	Neither	Agree	Strongly agree	Can't say/not applicable	Total	Weighted Average
5.4%	17.68%	7.72%	24.35%	42.81%	2.04%	1425	3.83
77	252	110	347	610	36		

67 per cent of recipients agree or strongly agree with this statement.

Responding to the question ‘I have access to adequate training and education to meet my current job needs within South Australia.’ The responses were:

Strongly Disagree	Disagree	Neither	Agree	Strongly agree	Can't say/not applicable	Total	Weighted Average
7.29%	32.29%	16.67%	36.46%	5.21%	2.08%	96	3.0
7	31	16	35	5	2		

Less than 50 per cent of respondents agree to his statement.



A further question ‘Education and training are available to help me to progress within South Australia’ revealed:

Strongly Disagree	Disagree	Neither	Agree	Strongly agree	Can't say/not applicable	Total	Weighted Average
6.25%	28.13%	21.88%	32.29%	5.21%	6.25%	96	3.02
6	27	21	31	5	6		

Less than 50 per cent of respondents agree with this statement.

These figures include the general public, representing approximately one third of the respondents. A more significant result would have been achieved had the question been restricted to those working in the sector.

The consultations, particularly the submissions and town hall meetings highlighted the lack of education for career artists in the sector.

10.2. Relevant Information

Following the consultation phase of this Review the government announced a Music Education Strategy for the years 2019 to 2029. This strategy, which has bipartisan support, should provide the framework for enhancement of music training, an identified key area of focus in the state’s education agenda.

The Joyce report⁶⁴ notes ‘International Education is a strong and growing industry for South Australia. It is now the state’s largest services export and second largest total export category. Student numbers continue to rise with the largest share of international enrolments consistently seen in the university sector.’

‘China is a very important market for international education in South Australia. In the year to December 2017, 43 per cent of international students arrived from China (12,237), followed by India (3228), Hong Kong (1712), Malaysia (1570) and Vietnam (1417). While the state’s international education sector is growing, South Australia’s share of national international students is currently around 4.5 per cent, less than its share of national GDP. That suggests opportunities for further growth.’

10.3. Opportunities

With the depth of tertiary education available in the state the opportunity exists for greater collaboration between the sector and the institutions. An ‘education brand’ for South Australia has not yet been established, although the state has many strengths in this area.

Noting the significant arts training resources available at South Australia’s three universities, its TAFE system and including the Adelaide College of the Arts, the Review team believes there is opportunity to attract more international students wishing to study the broad range of creative arts and creative industries courses available in the state.

AC Arts is underutilised and has the potential to be part of a new South Australia tertiary education brand. Similarly, no specialist ‘flagship’ secondary school for the arts exists.

⁶⁴ Joyce, the Hon Steven: Review of the South Australian Government’s International and Interstate Government Bodies and Function (2019). <https://dpc.sa.gov.au/?a=47887> Page 31.



Many mentioned the need or desire to have an ‘artist in schools’ program across the state as a long-term strategy in support of artistic practice.

There is opportunity to establish a centralised school visits booking system that would provide a ‘one-stop shop’ to manage schools visits to the North Terrace cultural precinct. This would be of advantage should the recommendation at Objective 8, for the North Terrace institutions to develop a connected Story of South Australia experience, be implemented.

Lifelong learning for the sector is seen to be lacking, and the opportunity exists for this to be addressed.

10.4. Recommendations

Recommendation 10.1. Develop South Australia as the centre for Arts tertiary education through development of a compelling BRAND.

This should include reviewing the function and use of AC Arts and its potential to become a multi-artform institution equivalent to NIDA or WAAPA as outlined in the 2009 study by Robyn Archer. This could include a joint venture with the Universities. A possible reference is the Australian Graduate School of Management, which was founded as a joint venture between the University of NSW and Sydney University.

Recommendation 10.2. Undertake a review as to the demand and feasibility of creating a Performing Arts High School/College in Adelaide.

Consider adapting the former Pasadena High School – now called Springbank Secondary College.

Recommendation 10.3. Work towards adopting the principles of STEAM in primary and secondary curricula.

This direction fits with an innovation and creativity curriculum. This should support the enhancement of the utilisation of the state’s extensive collections, with access both digital and site visits to cultural institutions.

Recommendation 10.4. Arts South Australia and the TAFE to partner to develop lifelong learning modules for the sector, including makers, creators and administrators.

This partnership should also commission a review to look at careers in the sector for artists and administrators.

10.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Develop South Australia as the centre for Arts tertiary education through development of a compelling BRAND	Undertake a review as to the demand and feasibility of creating a Performing Arts High School / College in Adelaide	Work towards adopting the principles of STEAM in primary and secondary curricula	Arts South Australia and the TAFE to partner to develop lifelong learning modules for the sector
To promote the role of arts and culture in enriching the lives of all South Australians				
To empower South Australia's makers and creators				
To champion Aboriginal and Torres Strait Islander arts and culture				
To amplify South Australia's signature strengths that define the character of the arts in the State				
To enhance the physical and organisational arts and culture infrastructure in South Australia				
To drive an approach in advocacy and future connected government investment in arts and culture				

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11. OBJECTIVE 11

International engagement – Inform and establish a strategy for international engagement of the Arts and Culture sector including the creative industries.

11.1. Context

Artists in all jurisdictions often regularly work across a local, national and global markets. This Review found that the area of international market development and engagement was a critical to the sustainability of many artists and companies currently based in South Australia. The Review also noted that a specific arts and cultural export and investment strategy did not currently exist. The Review therefore felt it was important to add this additional Objective that focuses on the opportunity for the sector through international engagement.

With a global outlook, South Australia can shape its reputation as a place of creativity and experimentation. A place that values arts and culture and welcomes people from all cultural backgrounds. It can become a preferred place in Australia for people to live and work, and to invest and establish creative businesses. It can also become a global launching pad for local artists and companies to export their products and services to the region and the world.

South Australian makers and creators are operating in a limited local market. Many need to grow international networks and stimulate new opportunities that connect with global audiences that in turn can lead to more sustainable practices and enterprises.

The 2019 Joyce⁶⁵ review made a number of recommendations to improve the state's international engagement to achieve a sustained growth target of 3 per cent per annum. Joyce prioritised the creative industries as one of eight sectors capable of driving export and investment to contribute to the state's economic growth. Joyce pointed to China, Japan and South Korea as potential key markets, but also cautioned that many creative businesses are start-ups and do not have the resources, knowledge or skills required to expand globally. In particular, he observed that a 'lack of business and entrepreneurial capabilities of artists and cultural workers may constrain this sector meeting its growth potential ...' and recommended the Government invest in research, training, business and market development to support potential growth (addressed in part in Objective 10).

The Department of the Premier and Cabinet (DPC) is responsible for oversight and coordination of the Government's international engagement, including diplomatic relations. The Department for Trade, Tourism and Investment (DTTI) is the front-line agency responsible for international investment attraction and trade promotion. The Department for Innovation and Skills (DIS) maintains responsibility for international migration and a portfolio of three creative industries sectors (screen, music and craft).

The Government has prioritised investment in high-tech industries and the innovation sector to reverse the state's economic decline following the closure of manufacturing industries. High-tech industries are driven by ideas and creativity, and they are inherently global and connected.

Arts South Australia and the Australian Film Corporation, both support a range of international initiatives, platforms and grants designed to build networks, foster artistic exchange, support export opportunities and generate investment. Neither agency has an

⁶⁵ South Australian Government's *International and Interstate Engagement Bodies and Functions (Joyce Review)*.

international strategy⁶⁶ and no analysis or assessment of international engagement has been made available to this Review.

The Arts Industry Council of South Australia has also advocated for capacity building for the arts and cultural sector. While not specifically aimed at developing international capabilities, the Creative Boom⁶⁷ report supports ‘integrating entrepreneurial skills and business acumen in training programs for our artists and cultural workers, [to] enable them to build new and exciting business models that promote sustainable growth.’

The Government has identified the urgent need to address South Australia’s slow population growth to ensure economic growth into the future. The state has 7 per cent of the Australian population and should therefore be receiving 7 per cent of Australian migration. In 2017 it attracted only 4.4 per cent. Figures from the Australian Bureau of Statistics show that Adelaide is the nation’s slowest growing capital city, with the exception of Darwin, growing by only 0.7 per cent in 2016-17. Adelaide’s total population increase of 9,600 was met entirely by people arriving from overseas.

11.2. Relevant information

It is important to note that a number of federal department and agencies invest in international cultural diplomacy, cultural exchange and arts market development. Awareness of this work, alignment and partnering where possible ensures optimal and efficient use of government investments.

The Department of Foreign Affairs and Trade’s (DFAT) Public Diplomacy Strategy prioritises initiatives that promote Australia’s creativity and foster cultural understanding, with a particular focus on the Indo-Pacific region. DFAT invests in cultural diplomacy through specialised staff at missions abroad and a range of programs and initiatives, including grants, focused country programs and Aboriginal and Torres Strait Islander arts. DFAT is currently leading a whole-of-government review to consider ‘... ways to better leverage Australia’s soft power assets and build effective partnerships to advance Australia’s security and prosperity.’

The Australian Trade and Investment Commission (Austrade) identifies the creative industries as one of 19 industry sectors requiring investment and support to develop export markets and attract inbound investment. Austrade has produced Industry Capability Reports on Australia’s cultural precincts, digital games and screen production, and supports the promotion of international education services.

The Arts Division of the Department of Communications and the Arts (DOCA) also delivers policies and programs that support the ability of Australian arts and cultural organisations and artists to engage internationally. In particular, DOCA facilitates collaboration to assist Australia to meet its international arts and cultural obligations under bilateral and multilateral agreements. Such agreements include to UNESCO (United Nations Educational, Scientific and Cultural Organization) conventions to which Australia is a signatory.

DOCA works across all levels of government and with international partners to facilitate collaboration through cultural cooperation arrangements, including under Free Trade Agreements. DOCA works to build relationships through other networks that facilitate cultural exchange, capacity-building partnerships, dialogue and market development in

⁶⁶ The Review is aware that at the time of writing this report DIS is working on a strategy for the AFC.

⁶⁷ Arts Industry Council of South Australia 2015 <https://aicisa.net.au/creativeboom/>

the arts and culture sectors. The objective of the work is to promote Australia's reputation of excellence and to assist Australia to meet its international arts and cultural obligations under multilateral agreements. Such agreements include UNESCO (United Nations Educational, Scientific and Cultural Organization) conventions to which Australia is a signatory.

The Australia Council for the Arts invests in strengthening the international profile of Australian art and artists by supporting artistic, market and audience development. Funding is available for international projects in the peer-assessed grant programs and through a range of strategic initiatives flowing from the Council's International Strategy. The strategy targets specific artforms in the priority geographic regions of Western Europe, North America, North Asia, South Asia and South East Asia. International Development Managers with specialist skills and experience provide an ongoing and active presence in each region. In addition to developing networks and providing market intelligence and advice, they support a range of initiatives including in and out-bound industry delegations, presenter platforms, offshore residencies and reciprocal exchange projects.

While Screen Australia does not have a stand-alone international strategy, international engagement and business development is embedded across the organisation's functions to support financing, production and promotion for Australian projects and practitioners.

11.3. Opportunities

South Australia is experiencing slow population and economic growth. The Joyce Review makes a series of commendable recommendations to address this trend. In particular, Joyce identified the important contribution of international migration and trade and investment, including international education services and the high-tech sector.

This presents an opportunity to position arts and culture as a key attractor in building the state's profile as a desirable place to live and work. South Australia's existing positive reputation for lifestyle can be strengthened by prioritising the value of cultural diversity, which will both support the Government's diplomatic engagement in the Indo-Pacific region and make the state an attractive location for skilled talent and students from overseas.

A number of South Australia's artists, arts organisations and cultural institutions are successfully exporting and collaborating internationally. There is a timely opportunity to support this international engagement by developing an export and investment strategy for the arts and culture sector. This could include developing business networks, knowledge and skills through export development programs, and forging links with South Australia's emerging high-tech sector, which is inherently global and connected. The strategy could also consider ways to enhance existing formal relationships with foreign governments and cities that support commercial and creative links, and promote cultural understanding.

As outlined at Objective 10, a comparatively small percentage of international students enrol in the extensive range of arts culture and creative industries courses offered by Adelaide's three universities and TAFE. There is an opportunity to effectively promote these courses of study to the international market.

International students are globally connected. They are cultural influencers and an exciting untapped resource and audience for local artists and cultural organisations. In 2017, there were nearly 36,000 international student enrolments in South Australian institutions compared to 11,100 enrolments in 2002, and Deloitte Access Economics has

quantified that one full-time job is currently created for every four international students. This equates to 2500 jobs per 100,000 international students, contributing \$350 million annually to the economy. At present, the greatest numbers of international students are arriving from China, followed by India, Hong Kong, Malaysia and Vietnam. There is a significant opportunity for the local arts and cultural community to engage with this student population.

The South Australian Government and the City of Adelaide have established international partnerships with a number of foreign governments and cities. These formal relationships support commercial and creative links, and promote cultural understanding and should be aligned and included in an export and investment strategy for South Australia's arts and creative industries.

11.4. Recommendations

Recommendation 11.1. Develop an export and investment strategy for South Australia's arts and creative industries.

The strategy should capitalise on the state's signature strengths, establish targets and deliver initiatives to support the sector's growth potential.

This strategy could include: provision of global market insights and advice; advice and funding support to develop export strategies for companies with export-ready products and services; establishment of an export fund with matched investment for approved companies that have an export strategy in place; in and out-bound trade delegations.

The development of the strategy could build the state's brand and positioning. The Department for Innovation and Skills, the South Australian Tourism Commission and Arts South Australia should collaborate in the development of this strategy, coordinated by the Department of Premier and Cabinet.

Recommendation 11.2. Develop a strategy to attract international students to Adelaide as a leading centre for Arts Tertiary education in Australia.

Recommendation 11.3. Develop a strategy to engage with the broader international student population from the time of their arrival in South Australia.

The strategy should focus on international students as important participants in, and contributors to, the cultural life of South Australia.

This strategy could include: cultural research into the international student cohort; new major events such as Asia Pop Fest; targeted public programs and special events hosted by cultural institutions, festivals and venues.

11.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Develop an export and investment strategy for South Australia’s arts and creative industries	Develop a strategy to attract international students to Adelaide as a leading centre for Arts Tertiary education in Australia	Develop a strategy to engage with the broader International student population from the time of their arrival in South Australia
To promote the role of arts and culture in enriching the lives of all South Australians			
To empower South Australia’s makers and creators			
To champion Aboriginal and Torres Strait Islander arts and culture			
To amplify South Australia’s signature strengths that define the character of the arts in the State			
To enhance the physical and organisational arts and culture infrastructure in South Australia			
To drive an approach in advocacy and future connected government investment in arts and culture			

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12. OBJECTIVE 12

How to approach the issue of storage for the collections in South Australia.

12.1. Context

One of the most strongly expressed observations made during consultation was the critical need to address current storage arrangements for the state collections – the museums, galleries, libraries, archives and botanic collections.

The need to address this issue as a priority warrants its inclusion as an additional review Objective.

The Review notes two earlier studies to assess the state's future collections storage requirements. The Review endorses and supports the adoption of the recommendations of these reports. The first was undertaken in 2007, The Movecorp Report on *Collection Storage for Arts South Australia 18/12/07* and the second in 2017 and prepared for Arts South Australia, *The Arts Infrastructure Survey*, December 2017. *The Arts Infrastructure Survey* report proposed the establishment of a Cultural Institutions Storage Committee to assess future storage requirements, and identify and implement options for satisfying those requirements. The 2007 study had earlier noted that at that time the off-site Museum storage facility was at or exceeding its 24,500 square-metre capacity, and that an estimated additional 30,000 m² would be required to meet projected needs to 2032.

The collecting institutions hold unique and irreplaceable objects which embody the narrative of South Australia. Significantly, they offer remarkable insight into the lives of Aboriginal Australians, and tell the story of the impact of European settlement and the contemporary identity of South Australian society.

Of concern is the conditions under which some of these collections are housed – often in facilities lacking climate control, with limited security systems in place.

The potential for a shared storage facility for key South Australian collections should be considered as referenced in the Plan and in Objective 9.2. Such a facility would support the presentation of a new narrative celebrating the state, which is referenced in the *Arts and Culture Plan 2019–2024*. It would also provide opportunity for a new level of connectivity and collaboration, also recommended in the *Arts and Culture Plan 2019–2024*.

A new storage facility should incorporate the best contemporary practice in climate controlled environments to suit diverse collections, and be housed in a building that exemplifies green building codes and environmental management.

Consideration should also be given to the future collection management system requirements of each of the institutions. A shared facility could enable a shared collection management system, with the potential to service the particular requirements of each of the collections.

The Review was impressed by the structure and operations of Artlab, which provides conservation services to the state collecting institutions and to private clients. Consideration should be given to co-locating Artlab with a future collections storage facility.

From the submissions, the following highlight the critical issues of storage.

The Art Gallery South Australia's submission highlighted that 'The sustainability and care of the state's most valuable heritage asset is AGSA's key priority. AGSA houses, cares

for, researches and presents one of the largest art collections in Australia totalling more than 45,000 works with a replacement value of \$0.97 billion. Currently 97 per cent of the collection is held in critically poor storage conditions well below industry standards, while the 3 per cent on display is less than museum averages. Developing an improved and expanded storage facility is vital for the appropriate care into the future of the state's growing art collection. Rethinking how we provide access to the collection is also critical, investing in digital solutions that respond to audience desires.'

The South Australian Museum submission highlighted that 'A strategic capital infrastructure plan is essential, incorporating ... purpose-built storage facilities, with controlled-environments to comply with statutory obligations for object protection/ risk reduction. (Specialised requirements include an extensive frozen wild-animal tissue collection and whale/dolphin collection)'

In some institutions valuable display areas are now used for storage.

While the government has recently invested in updating the storage of the Australian Aboriginal Material Cultures Collection this is still not adequate for such an irreplaceable collection.

12.2. Relevant information

Historically governments and arts agencies have focused on investments which are visible, offer immediate public benefit and return on investment. Collection storage facilities have not traditionally ranked highly in governments' priorities.

Over the past decade, however, collecting institutions around the world have made significant investment to redress past neglect. In doing so, they have found innovative ways to secure the long-term future for collection objects, significantly increase the proportion of collections accessible, and opportunities for the facilities to be available as places of learning and discovery.

The Review references a number of examples which may inform an approach to address South Australia's urgent need.

The Museums Discovery Centre at Castle Hill in NSW was originally constructed to house the collection of the Museum of Applied Arts and Sciences. Conceived as a visible storage facility, it was designed to be open to the public at selected times. Collection items are presented in massed, thematic racking systems with minimal interpretation. The Centre has increased access to its collection from 3 per cent to over 30 per cent. In recent years further investment at the site created additional storage for two other state cultural institutions – the Australian Museum and Sydney Living Museums. This shared storage facility offers economies in operational costs, enables the narratives that connect the collections and their place in the history of New South Wales, and provides a richer and more diverse visitor experience.

The Review noted other examples of contemporary practice in collection storage – the Auto Theater at the Swiss Museum of Transport in Lucerne, which features a wall of 80 motor vehicles displayed in multi-level racking, the multi-faceted 'cabinet of curiosities' facility currently being constructed for the UK Sciences Museums Group at Wroughton, and the bold Collections Conservation Centre also under construction in Ottawa, Canada. The Birmingham Museum and Gallery in the UK is currently adapting a redundant shopping complex as an innovative collection store, which will also include spaces for community use and offer school visits, collection tours and skill development opportunities.

12.3. Opportunities

South Australia's unique cultural collections are facing increasing risk of damage and loss due to significant constraints on collections storage facilities. Existing collections storage does not meet the required standards for collecting institutions, and existing storage facilities are either approaching capacity, or exceeding capacity for some institutions. This issue was identified in the 2017 *the Arts Infrastructure Survey*.

A project is currently underway to comprehensively understand and document the current and future requirements of each cultural institution and identify and implement options for the long-term storage of the State's collection. This needs to be accelerated.

The Lot Fourteen development provides opportunity to increase public access to the Aboriginal Material Cultures collection. Public access would need to respect the requirements of Aboriginal peoples and those of academic researchers. Open Storage and Open Display concepts may be considered along with digitisation, in order to integrate storage and access. The irreplaceable 'Secret/Sacred' collection should be regarded as a storage priority.

12.4. Recommendations

Recommendation 12.1 Implement the recommendations of the Cultural Institutions Storage initiative and the scope of CISSA (Cultural Institutions Storage Steering Committee).

Storage solutions must respect and recognise the global significance of key collections, such as that of the South Australian Museum, including the Australian Aboriginal Material Cultures Collection, the outstanding art collection of the Art Gallery South Australia, the State Library and the History Trust.

Consideration should be given to:

- Bringing the storage under one location and one roof, shared storage, subject to risk management considerations;
- Housing the exceptional Artlab business with the storage operation;
- The range of public access options for distinct audiences. This includes provisions for research access and education access;
- The provision of storage for the South Australian Museum's Aboriginal Material Cultures collection at Lot Fourteen.

12.5. Alignment to the Goals of the Arts and Culture Plan 2019–2024

The Goals	Implement the recommendations of the Cultural Institutions Storage initiative
To promote the role of arts and culture in enriching the lives of all South Australians	
To empower South Australia’s makers and creators	
To champion Aboriginal and Torres Strait Islander arts and culture	
To amplify South Australia’s signature strengths that define the character of the arts in the State	
To enhance the physical and organisational arts and culture infrastructure in South Australia	
To drive an approach in advocacy and future connected government investment in arts and culture	

13. OBJECTIVE 13

Evaluation and Measurement – the measurement of value and impact of the investment into Arts and Culture in South Australia.

13.1. Context

The fundamental value of arts and culture demands our attention. Over the past decade arts agencies, governments, researchers and organisations have invested in research to find appropriate and effective frameworks and methods to better capture the value contributed by arts and culture to diverse aspects of society, economy and community.

The work of capturing and measuring value is however complex. It requires investment in appropriate, long-term evaluation frameworks aligned to best practice methods of measurement and indicator development that are specific to relevant fields of impact, whether health, education, economic development or social inclusion. Arts advocates and policy makers now recognise the need to move beyond short-term, or post-investment project evaluation. Consideration needs to be given to longer term frameworks capable of defining, capturing and measuring how change is achieved, encapsulated, for example, by ‘theory of change’ methodologies.

Recognising that many of the benefits of the arts are not only instrumental in their ‘impacts’, but in fact embodied in the particular qualities of diverse arts and cultural practices in themselves, attention has also focused on how to better capture the intrinsic cultural value of arts and culture. South Australian researchers are among Australia’s most passionate advocates of new cultural value frameworks, through existing partnerships with the South Australian Government. This work demonstrates that South Australia is well placed to continue to lead in this area.

In short, the effectiveness of measurement requires clear frameworks for data collection and indicators of change, underpinned by agreed definitions of value and impact.

13.1.1. Current relevant work in South Australia

Advances in thinking and work in this area have been made both at Flinders University⁶⁸ and the University of Adelaide⁶⁹.

In *What Matters? Talking Value in Australian Culture*⁷⁰ the authors argue that too often, cultural leaders and policy makers want to chase the perfect metric for activities whose real worth lies in our own personal experience. The major problem facing Australian culture today is demonstrating its value – to governments, the business sector, and the public in general.

In consultations for this review, Laboratory Adelaide⁷¹ positioned the concept of measurement as ‘the *value* reporting process has to be about more than measurement. Measurement occurs in *value* reporting but *value* is so much more than just measuring.’⁷²

68 Professor Julian Meyrick and Dr Tully Barnett.

69 Dr Justin O’Connor.

70 Meyrick, Julian, Robert Phiddian and Tully Barnett *What Matters? Talking Value in Australian Culture* (Monash University Press, 2018).

71 Flinders University.

72 Professor Julian Meyrick.

13.2. Relevant information

The Consultation identified a range of models being researched or developed and noted significant resources have been applied to this area. It noted the local models were well documented. Furthermore, it noted that the work of the Cultural Development Network (CDN) and their WhiteBox model, as elaborated below, and other models are being used by the corporate sector. There appears to be a significant barrier or resistance to bring these models and research together to create a solution. It is beyond the scope of this review to determine the reasons for this resistance or reluctance to share valuable learnings, or work collaboratively to find the ultimate solution. We therefore recommend that all this thinking and research be shared and developed to solve this singular challenge and a mechanism be found to overcome the existing barriers to working.

The CDN in Melbourne is working to develop a measurement framework and was consulted as part of the Review.

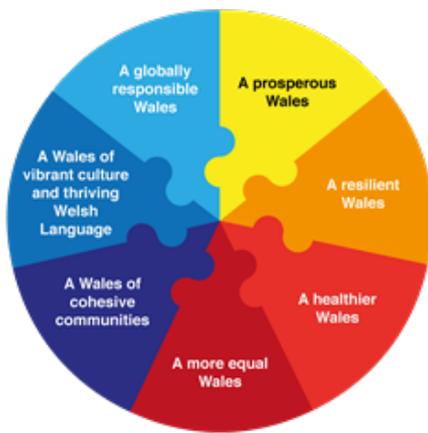
The CDN has a goal to support a *'culturally rich and vibrant society by working to increase the expression of culture through the platform of the arts, libraries and heritage'*. The CDN achieves this 'by building the capacity of local government across Australia to support artists and local communities and work towards integrated planning across all levels of government'. The CDN has developed a range of processes and tools to support its goal and has created an online portal, WhiteBox. The WhiteBox is an online resource that aims to assist better planning, execution and evaluation of cultural activities. The system has been developed over four years of practice and research by the CDN in conjunction with local government, state and commonwealth arts funding agencies and independent producers. *'WhiteBox responds to the problem of a lack of consistent measures and understanding of the outcomes of cultural activity'*. With significant investment by governments in culture and heritage, and the increasing focus by Auditors-General, governments and the public on outcomes, there is a need for the cultural sector to be able to articulate the difference it makes. WhiteBox ensures that all activities have intended outcomes that address the strategic goals of the organisation. This integrates reporting into the monitoring role of the governance body of the organisation⁷³.

From the Review's research, New Zealand, Scotland and Wales provide international examples of advances in measurement. The Welsh Government links arts and culture to wellbeing.

In New Zealand, Professor Mark Moore asks 'what *value* is added, beyond simple monetary costs and benefits?' New Zealand uses a Living Standards Framework, measuring Natural Capital, Social Capital, Human Capital and Financial/Physical Capital.

In 2015, Wales passed its 'Wellbeing for Future Generations Act.' The Act seeks to improve the social, economic, environmental and cultural wellbeing of Wales. It is intended to make the public bodies identified in the Act think more about the long-term, work more effectively with communities and with each other.

⁷³ <https://culturaldevelopment.net.au/#>



The Act also puts in place seven wellbeing goals for a prosperous, healthier, resilient, more equal and globally responsible Wales, with cohesive communities, a vibrant culture and thriving Welsh language.

13.3. Opportunities

South Australia has the opportunity to build on existing local work in this area and establish a measurement system that works for the sector, the community and the government.

13.4. Recommendation

Recommendation 13.1 Develop an evaluation and measurement framework that captures the value of arts and culture, one that builds on and draws together the existing work undertaken in this area.

The framework could comprise a set of interlinked initiatives that are aligned to the key goals of the Plan. The framework should include whole-of-government, cross-ministry measures as tabled in Recommendation 7.1. For this to be effective, data collection frameworks will need to be established and implemented by key government agencies. Data collection is a long-term measure.

Possible initiatives could include:

- Confirmation of agreed indicators to measure progress against key goals, considering, for example, cultural value investments, social impact outcomes, education and economic development;
- Indicators to be supported by robust evidence data sources and, where possible, open data;
- This work to be underpinned by investment in improved social impact of arts and culture evaluation frameworks and data collection methods, aligned to current best practice, in partnership with relevant government agencies and organisations;
- Progressing Cultural Value frameworks initiated by South Australian researchers in partnership with the South Australian Government;
- Investment in a public-facing dashboard to support ongoing monitoring and evaluation over time.

13.5. Alignment to the Goals of the Arts and Culture Plan 2019 -2024

The Goals	Develop an evaluation and measurement framework that captures the value of arts and culture , one that builds on and draws together the existing work undertaken in this area
To promote the role of arts and culture in enriching the lives of all South Australians	
To empower South Australia’s makers and creators	
To champion Aboriginal and Torres Strait Islander arts and culture	
To amplify South Australia’s signature strengths that define the character of the arts in the State	
To enhance the physical and organisational arts and culture infrastructure in South Australia	
To drive an approach in advocacy and future connected government investment in arts and culture	

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Note: In general references to websites are in footnotes and not included in the bibliography. However, a number of websites used extensively in the Review are highlighted here:

The Australia Council for the Arts website portal, Arts Nation, was used extensively in this Review.

<https://australiacouncil.gov.au/research/>

The National Arts Participation Survey

https://www.australiacouncil.gov.au/workspace/uploads/files/naps__sa-highlights_14-july-596938d084ce8.pdf

The National Artists Survey led by Professor David Throsby: <https://australiacouncil.gov.au/research/making-art-work/>

The extensive archive of the Arts Industry Council of South Australia

<https://aicsa.net.au/2019/>

Festivals Adelaide

<http://www.festivalsadelaide.com.au/>

The Australian Major Performing Arts groups, Review of private sector support for the performing arts.

<https://www.ampag.com.au/article/private-sector-support-for-the-performing-arts-grows-to-record-levels>

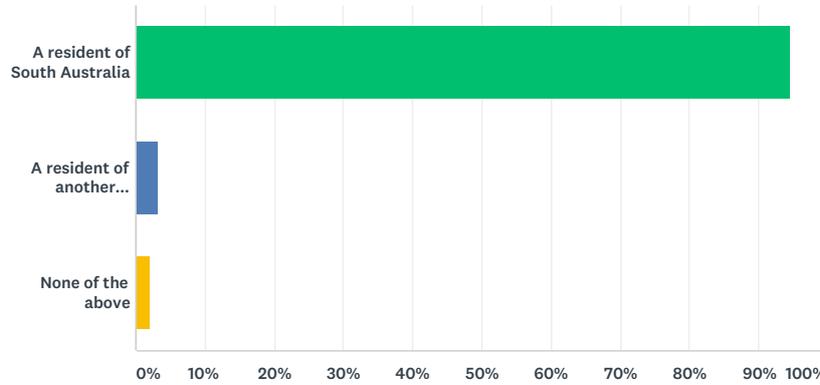
APPENDIX



APPENDIX A SURVEY REPORT

Q1 Which of the following best describes you?

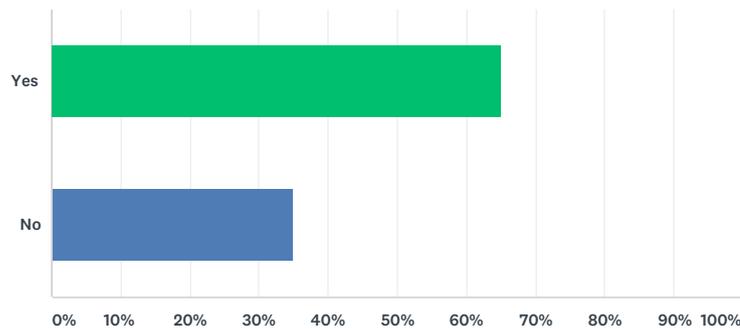
Answered: 1,843 Skipped: 0



ANSWER CHOICES	RESPONSES	
A resident of South Australia	94.63%	1,744
A resident of another Australian state or territory	3.20%	59
None of the above	2.17%	40
TOTAL		1,843

Q2 Do you work in the arts or derive any of your income from arts related activities within South Australia? (Select one answer)

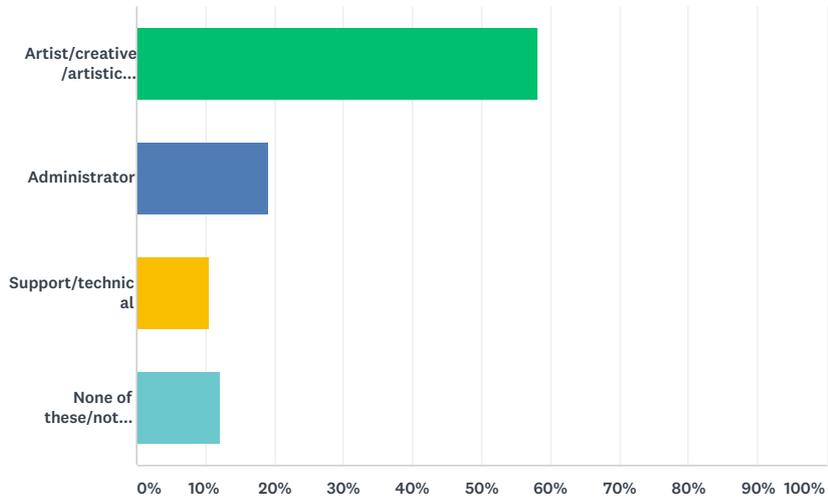
Answered: 1,825 Skipped: 18



ANSWER CHOICES	RESPONSES	
Yes	65.10%	1,188
No	34.90%	637
TOTAL		1,825

Q3 Which of the following best describes your main current arts-based occupation? (Select one answer)

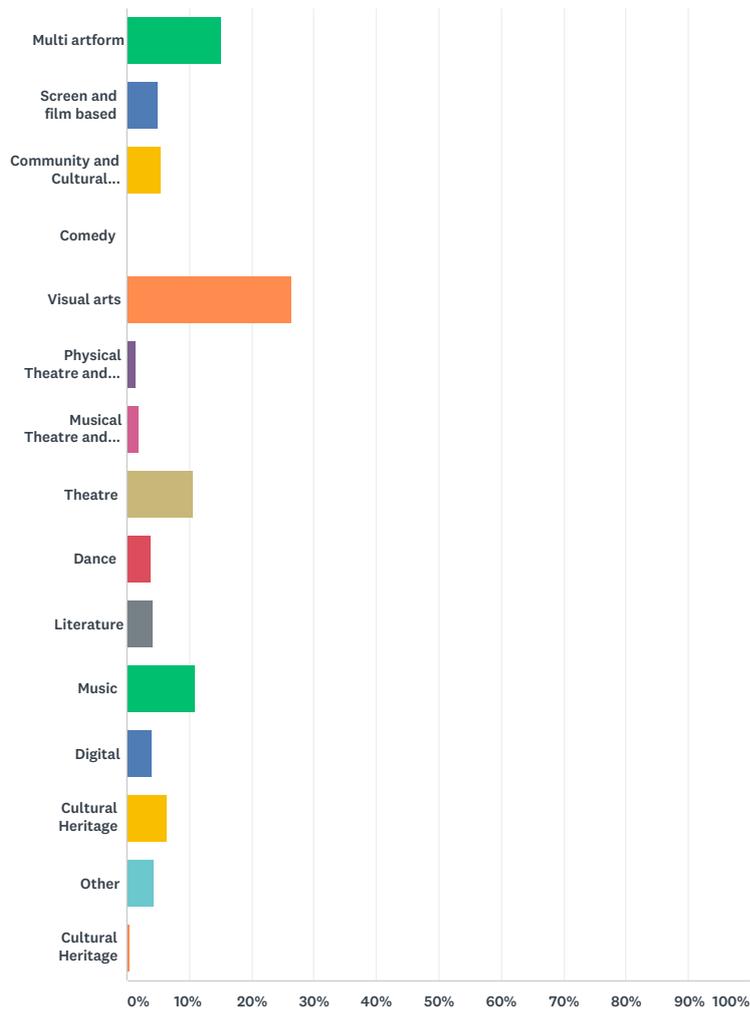
Answered: 1,139 Skipped: 704



ANSWER CHOICES	RESPONSES	
Artist/creative/artistic director	58.12%	662
Administrator	19.14%	218
Support/technical	10.54%	120
None of these/not applicable	12.20%	139
TOTAL		1,139

Q4 Which one of the following best describes the current primary art form you derive some income from? (Select one answer)

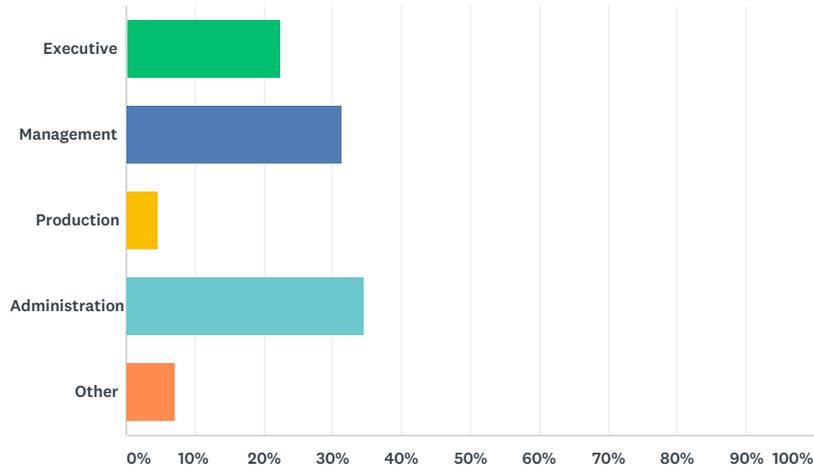
Answered: 1,113 Skipped: 730



ANSWER CHOICES	RESPONSES	
Multi artform	15.00%	167
Screen and film based	4.94%	55
Community and Cultural Development based practice	5.39%	60
Comedy	0.09%	1
Visual arts	26.42%	294
Physical Theatre and Circus	1.53%	17
Musical Theatre and Cabaret	1.80%	20
Theatre	10.69%	119
Dance	3.86%	43
Literature	4.13%	46
Music	10.96%	122
Digital	3.95%	44
Cultural Heritage	6.47%	72
Other	4.31%	48
Cultural Heritage	0.45%	5
TOTAL		1,113

Q5 Which one of the following best describes your main current administration role? (Select all that apply)

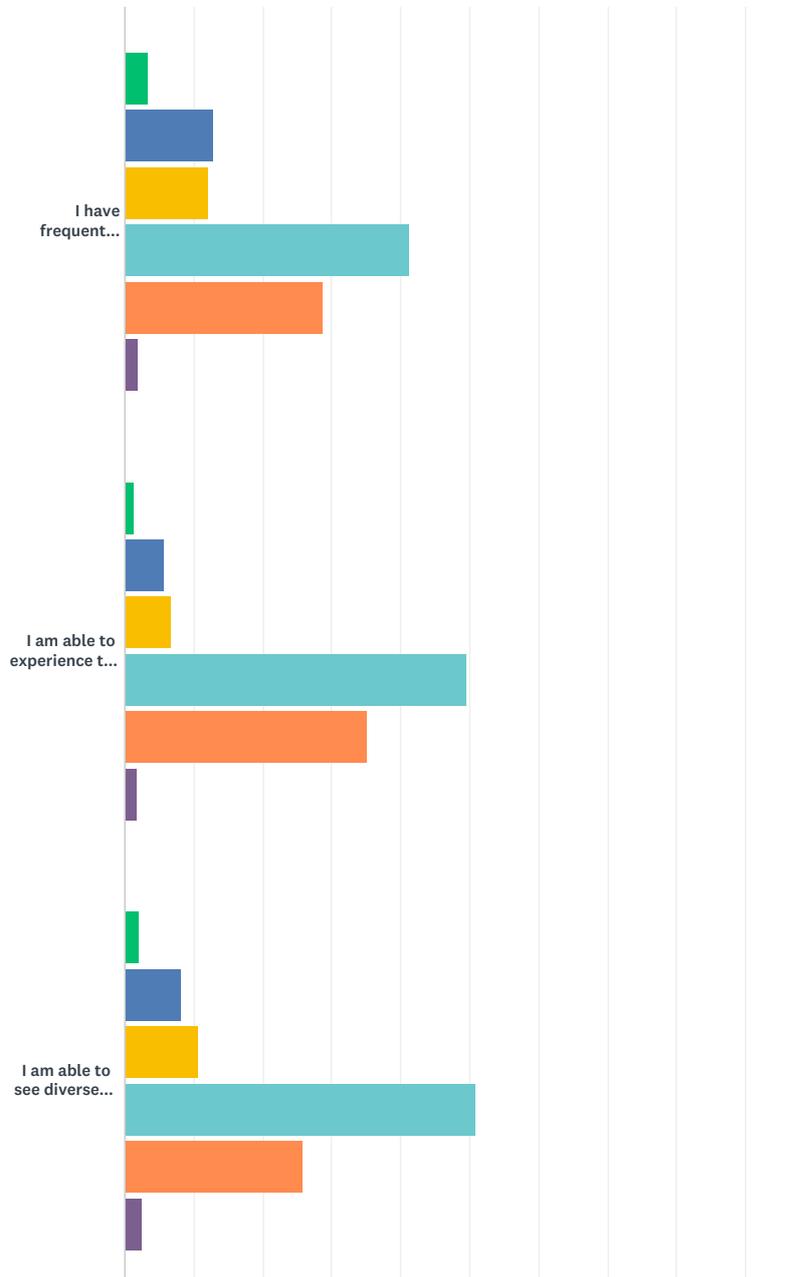
Answered: 214 Skipped: 1,629

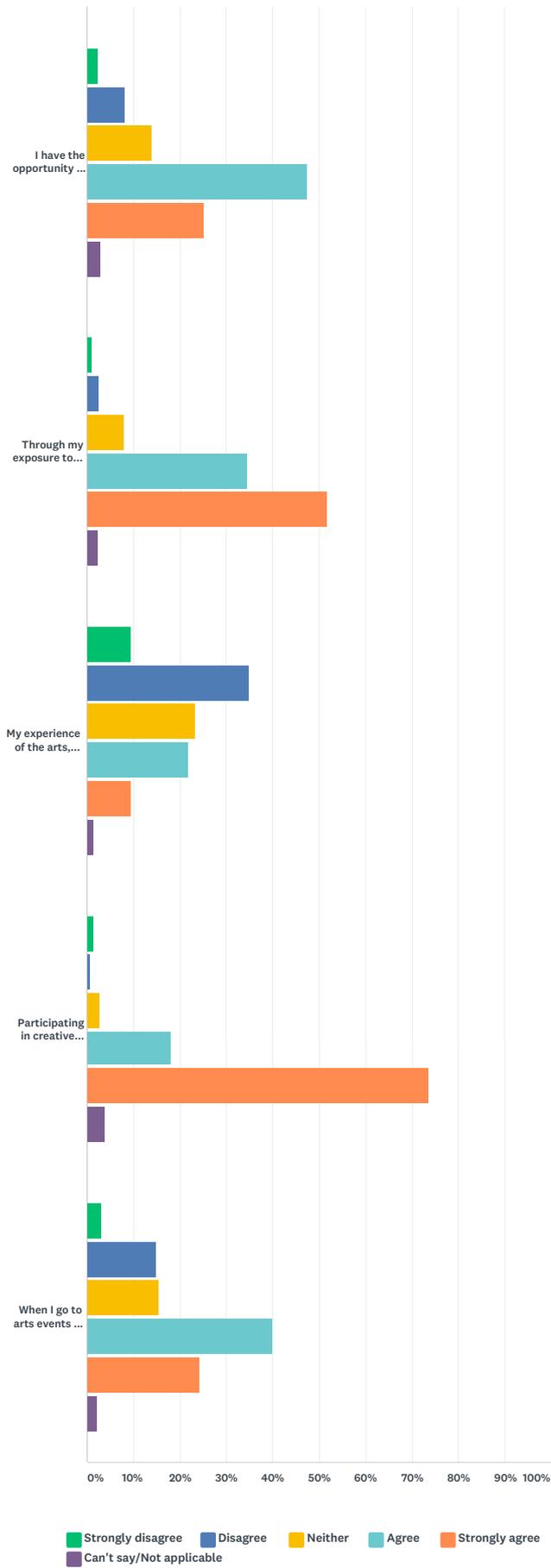


ANSWER CHOICES	RESPONSES	
Executive	22.43%	48
Management	31.31%	67
Production	4.67%	10
Administration	34.58%	74
Other	7.01%	15
TOTAL		214

Q6 The following questions refer generally to your current experience of the arts in society while living or working within South Australia. Please indicate your agreement or disagreement with the following statements as they relate to South Australia. (Select one answer per row)

Answered: 1,513 Skipped: 330



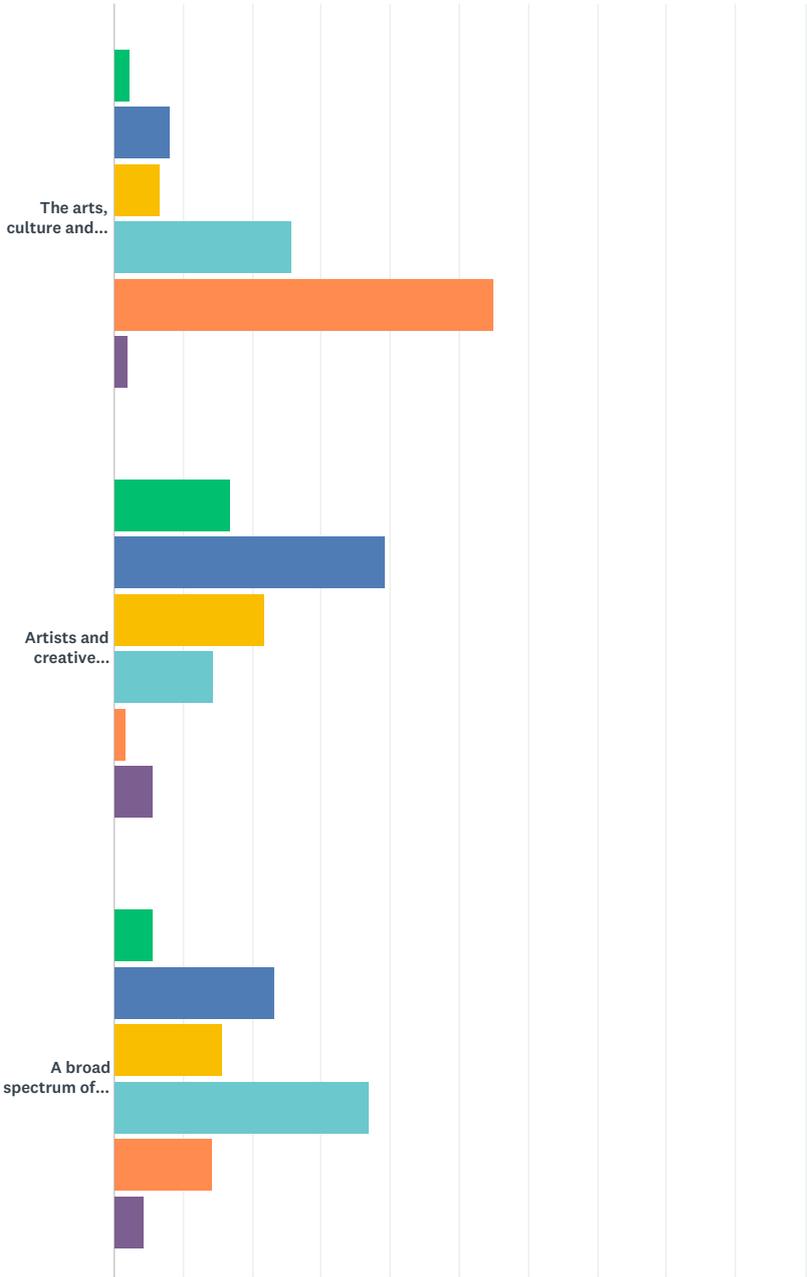


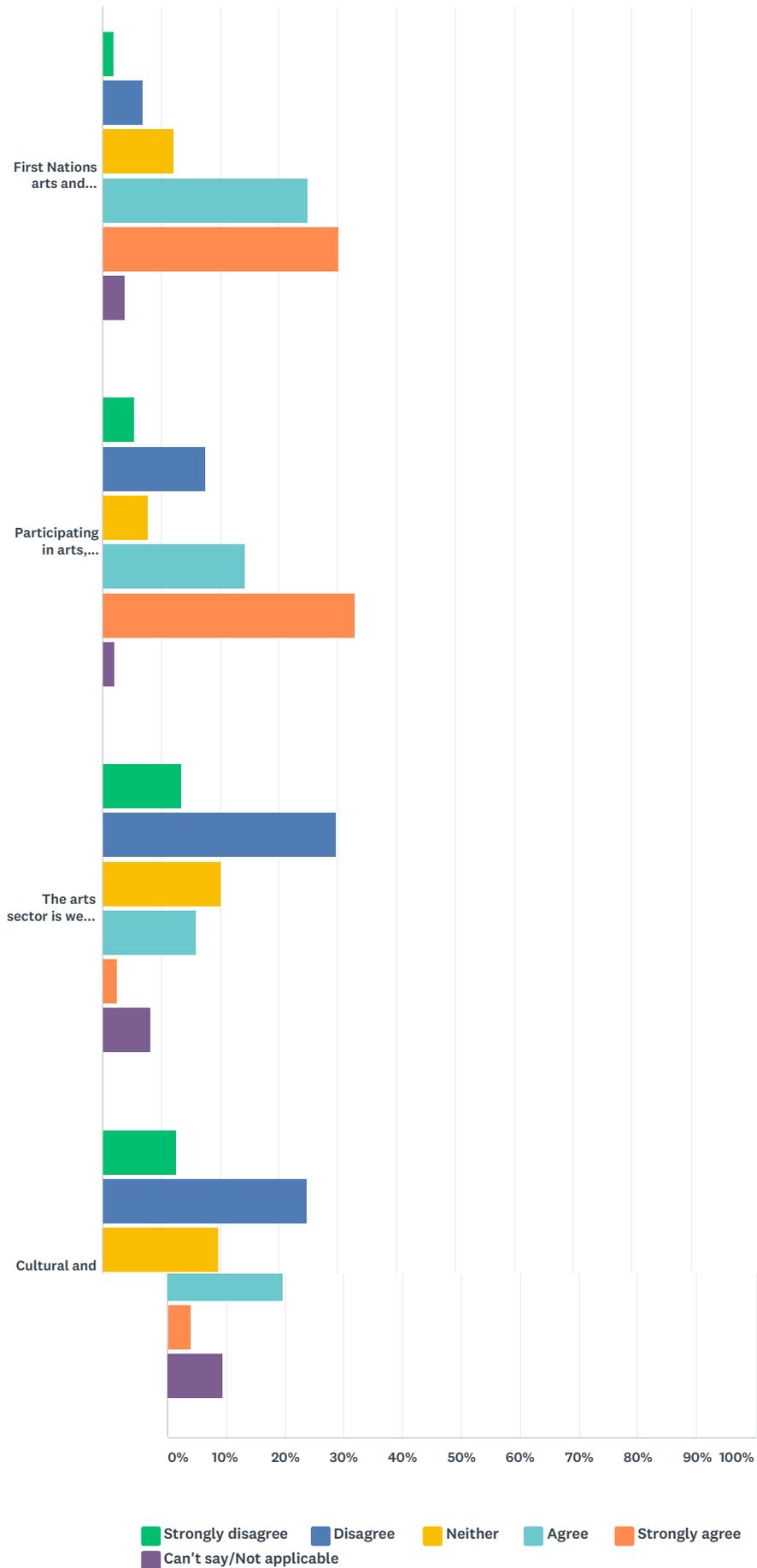
	STRONGLY DISAGREE	DISAGREE	NEITHER	AGREE	STRONGLY AGREE	CAN'T SAY/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
I have frequent opportunities to participate in cultural and creative activities	3.30% 50	12.69% 192	12.16% 184	41.24% 624	28.68% 434	1.92% 29	1,513	3.81
I am able to experience the work of local artists and creative practitioners	1.26% 19	5.75% 87	6.68% 101	49.50% 749	35.16% 532	1.65% 25	1,513	4.13
I am able to see diverse cultures reflected in the artistic and creative practices	2.12% 32	8.26% 125	10.77% 163	50.76% 768	25.64% 388	2.45% 37	1,513	3.92
I have the opportunity to learn about First Nations cultures through arts events	2.38% 36	8.06% 122	13.95% 211	47.46% 718	25.18% 381	2.97% 45	1,513	3.88
Through my exposure to artists, cultural events and experiences I am able to gain empathy towards others who are different to me	1.06% 16	2.45% 37	7.93% 120	34.43% 521	51.75% 783	2.38% 36	1,513	4.37
My experience of the arts, culture and creativity is focused around major festivals	9.32% 141	34.90% 528	23.13% 350	21.81% 330	9.45% 143	1.39% 21	1,513	2.87
Participating in creative arts or cultural activities is good for my overall well being	1.39% 21	0.53% 8	2.71% 41	17.98% 272	73.63% 1,114	3.77% 57	1,513	4.68
When I go to arts events or festivals I'm mostly wanting to be entertained and to have a good time	3.17% 48	14.81% 224	15.53% 235	39.99% 605	24.32% 368	2.18% 33	1,513	3.69



Q7 The following questions seek your opinion on the overall state of the arts in South Australian daily life and culture. Please indicate your agreement or disagreement with the following statements as they relate to South Australia. (Select one answer per row)

Answered: 1,428 Skipped: 415

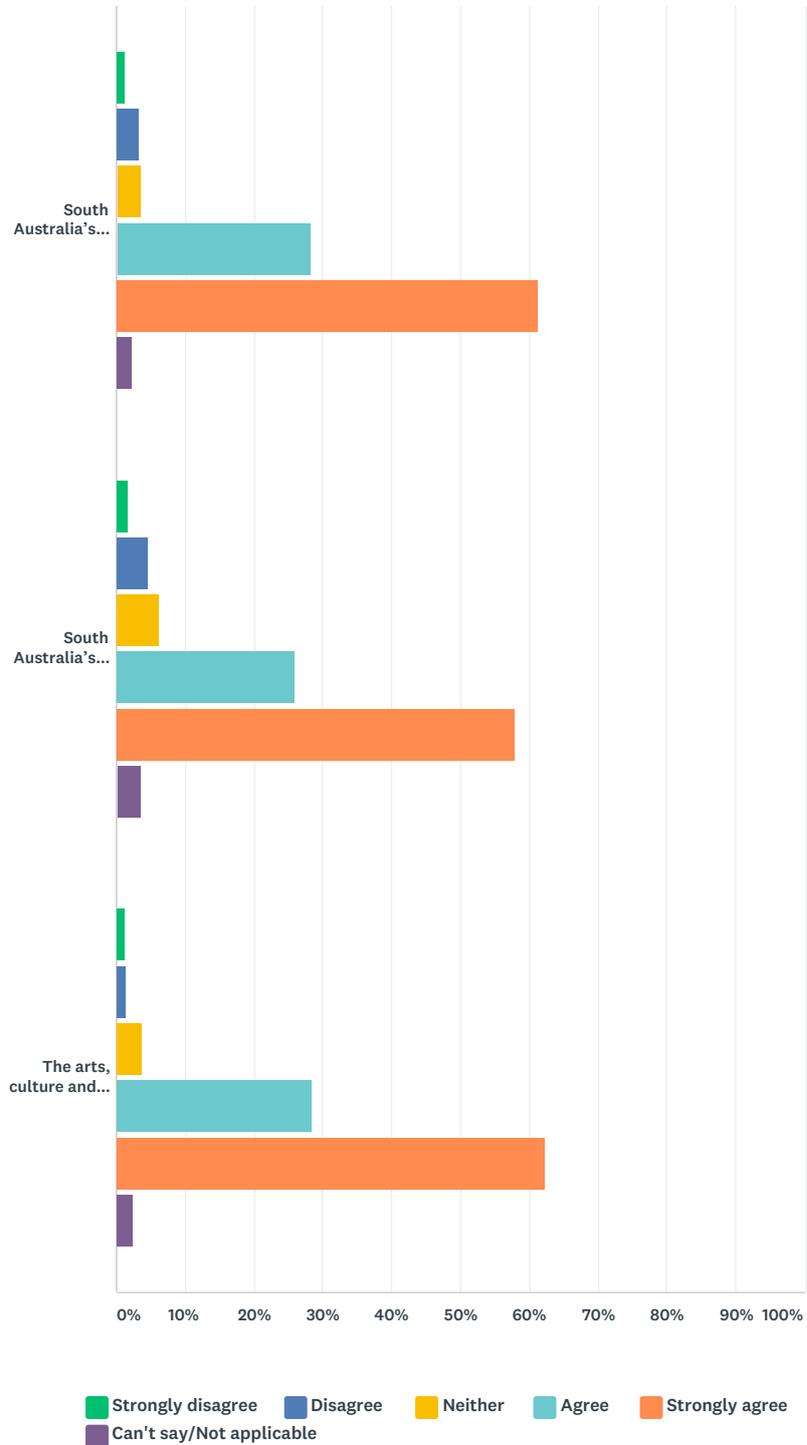




	STRONGLY DISAGREE	DISAGREE	NEITHER	AGREE	STRONGLY AGREE	CAN'T SAY/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
The arts, culture and creativity are an integral part of everyday life	2.24% 32	8.19% 117	6.79% 97	25.70% 367	54.97% 785	2.10% 30	1,428	4.26
Artists and creative practitioners are able to find successful career pathways	17.02% 243	39.36% 562	21.71% 310	14.50% 207	1.68% 24	5.74% 82	1,428	2.41
A broad spectrum of audiences participate in artistic and creative experiences	5.60% 80	23.18% 331	15.76% 225	36.97% 528	14.15% 202	4.34% 62	1,428	3.32
First Nations arts and culture are integral to the wider arts, culture and creative sector	1.89% 27	6.93% 99	12.18% 174	35.01% 500	40.27% 575	3.71% 53	1,428	4.09
Participating in arts, culture and creativity is seen as being integral to a good education	5.39% 77	17.65% 252	7.77% 111	24.37% 348	42.79% 611	2.03% 29	1,428	3.83
The arts sector is well equipped to find innovative ways of attracting support	13.31% 190	39.78% 568	20.17% 288	15.97% 228	2.52% 36	8.26% 118	1,428	2.51
Cultural and creative workers from South Australia have many opportunities to pursue national and international careers in the arts, cultural or creative sectors	12.54% 179	34.73% 496	19.75% 282	19.61% 280	3.92% 56	9.45% 135	1,428	2.64

Q8 Turning now to the wider impact of the arts sector on South Australia, please rate your level of agreement with the following statements. (Select one answer per row)

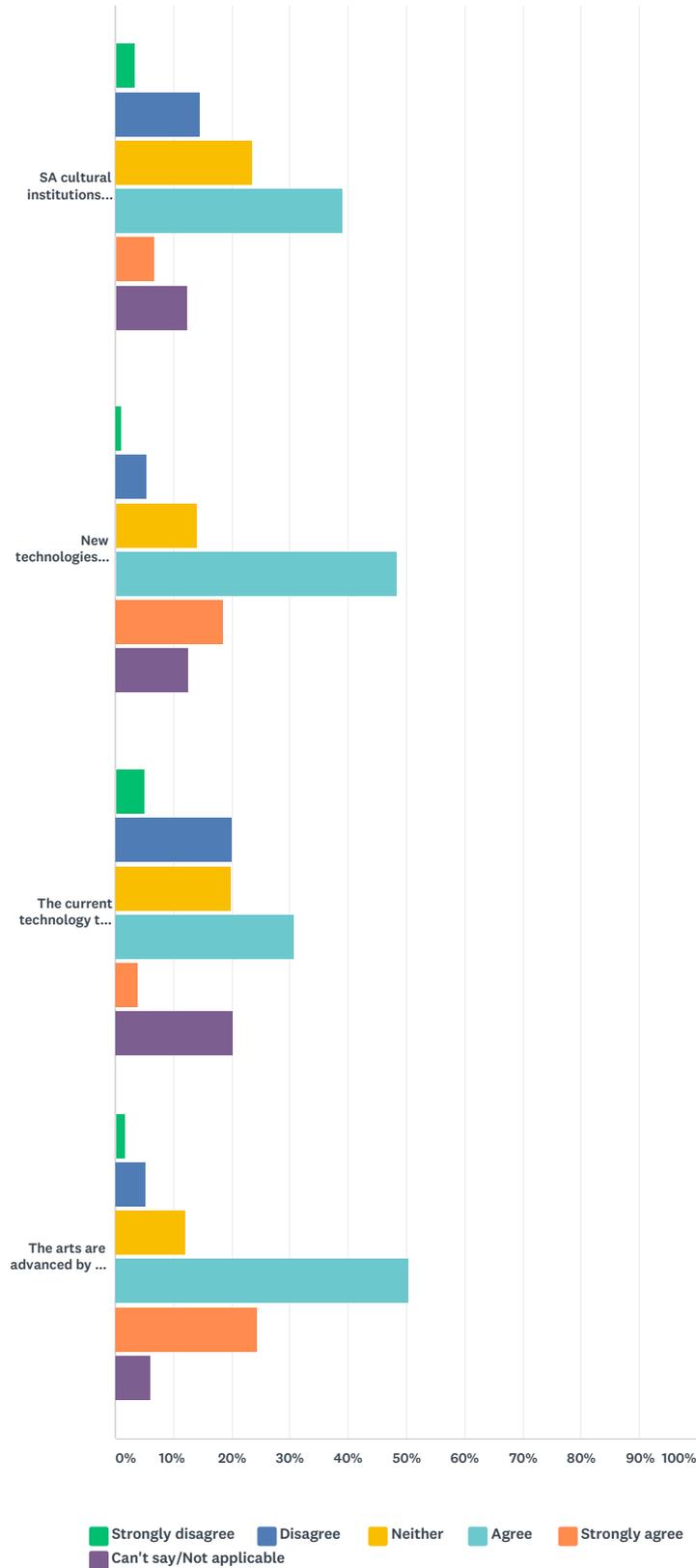
Answered: 1,415 Skipped: 428



	STRONGLY DISAGREE	DISAGREE	NEITHER	AGREE	STRONGLY AGREE	CAN'T SAY/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
South Australia's arts and creative sectors contribute significantly to the state's national reputation	1.34% 19	3.25% 46	3.60% 51	28.34% 401	61.20% 866	2.26% 32	1,415	4.48
South Australia's arts and creative sectors contribute significantly to the state's international reputation	1.70% 24	4.66% 66	6.29% 89	25.87% 366	58.02% 821	3.46% 49	1,415	4.39
The arts, culture and creativity sectors contribute to the wider economy in important ways	1.34% 19	1.41% 20	3.82% 54	28.55% 404	62.26% 881	2.61% 37	1,415	4.53

Q9 Thinking about the contribution of technology in the South Australian arts sector, please rate your level of agreement with the following statements. (Select one answer per row)

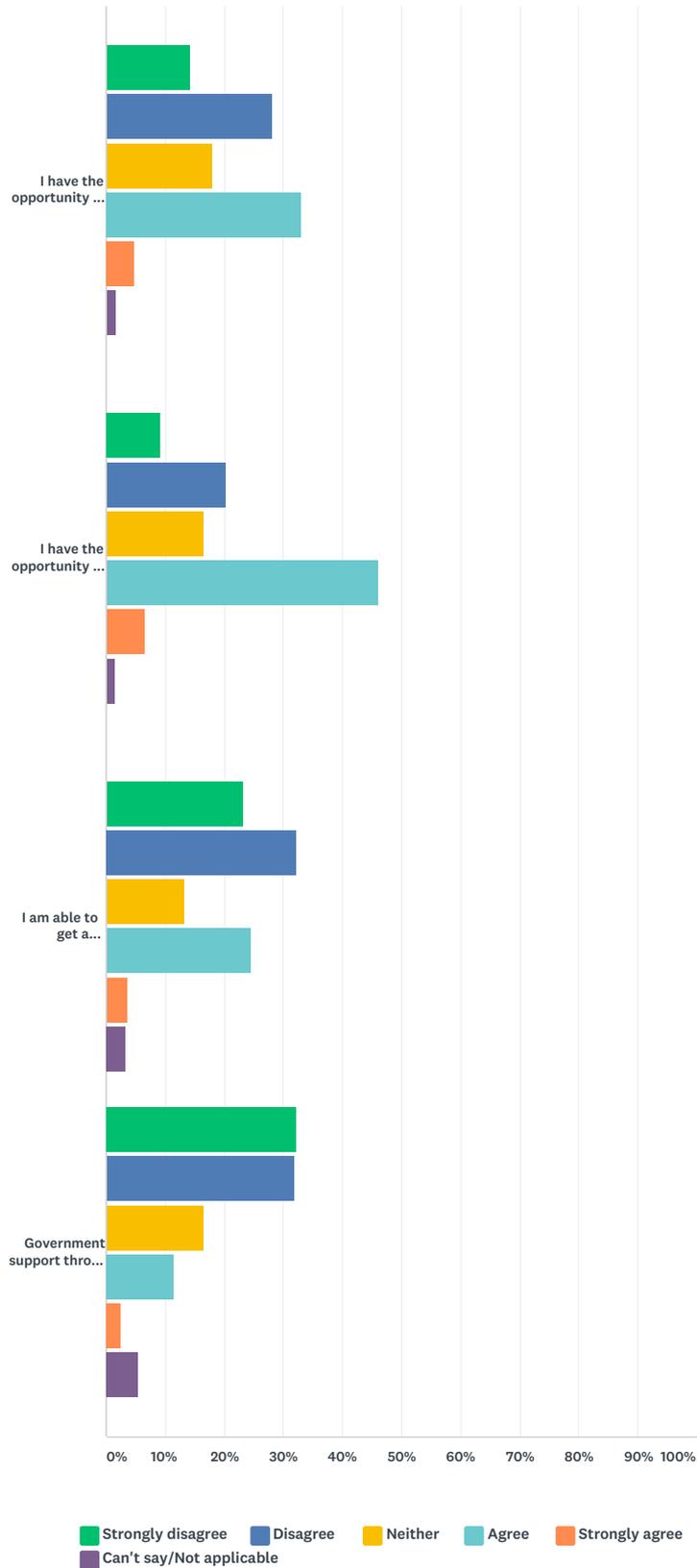
Answered: 1,400 Skipped: 443



	STRONGLY DISAGREE	DISAGREE	NEITHER	AGREE	STRONGLY AGREE	CAN'T SAY/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
SA cultural institutions make good use of new technologies to deliver and showcase diverse artistic and cultural works	3.36% 47	14.57% 204	23.71% 332	39.21% 549	6.71% 94	12.43% 174	1,400	3.36
New technologies are an enabler for many artists and cultural practitioners working in SA	1.14% 16	5.50% 77	14.00% 196	48.29% 676	18.57% 260	12.50% 175	1,400	3.89
The current technology that I can access in SA is sufficient to support my arts practice	5.00% 70	20.00% 280	19.79% 277	30.86% 432	4.00% 56	20.36% 285	1,400	3.11
The arts are advanced by the introduction of new technologies	1.64% 23	5.29% 74	12.07% 169	50.36% 705	24.57% 344	6.07% 85	1,400	3.97

Q10 Thinking now about your own arts practice or occupation, please indicate your agreement or disagreement with the following statements as they relate to South Australia. (Select one answer per row)

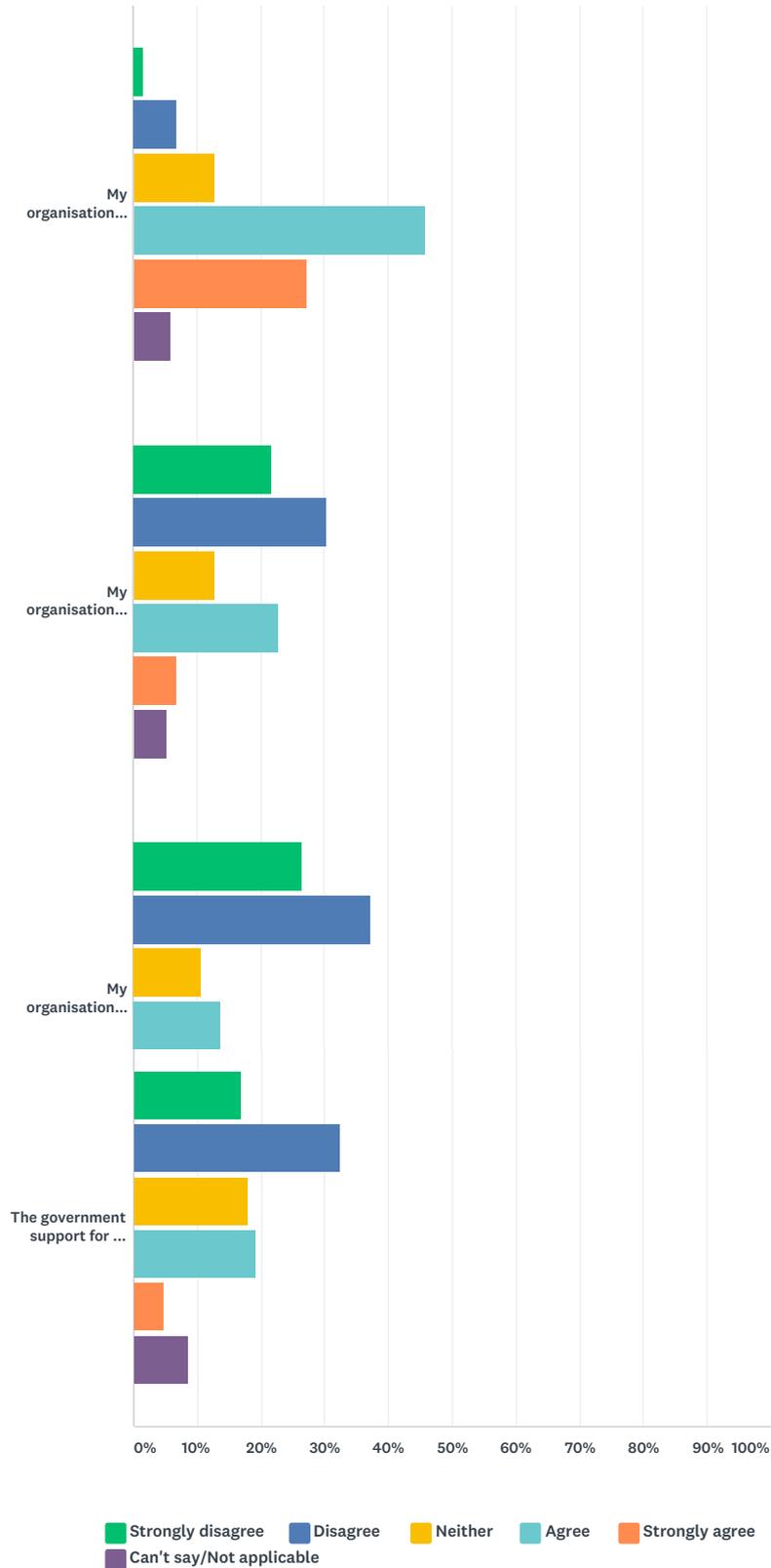
Answered: 553 Skipped: 1,290



	STRONGLY DISAGREE	DISAGREE	NEITHER	AGREE	STRONGLY AGREE	CAN'T SAY/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
I have the opportunity and am supported to develop my art form	14.29% 79	28.03% 155	18.08% 100	33.09% 183	4.88% 27	1.63% 9	553	2.86
I have the opportunity to find an audience for my work	9.22% 51	20.25% 112	16.46% 91	46.11% 255	6.51% 36	1.45% 8	553	3.21
I am able to get a commercial return for my work	23.15% 128	32.19% 178	13.20% 73	24.41% 135	3.62% 20	3.44% 19	553	2.51
Government support through grants and funding for the arts is currently working well for me	32.19% 178	31.83% 176	16.46% 91	11.57% 64	2.53% 14	5.42% 30	553	2.16

Q11 Thinking now about your current main arts organisation, please indicate your agreement or disagreement with the following statements as they relate to South Australia. (Select one answer per row)

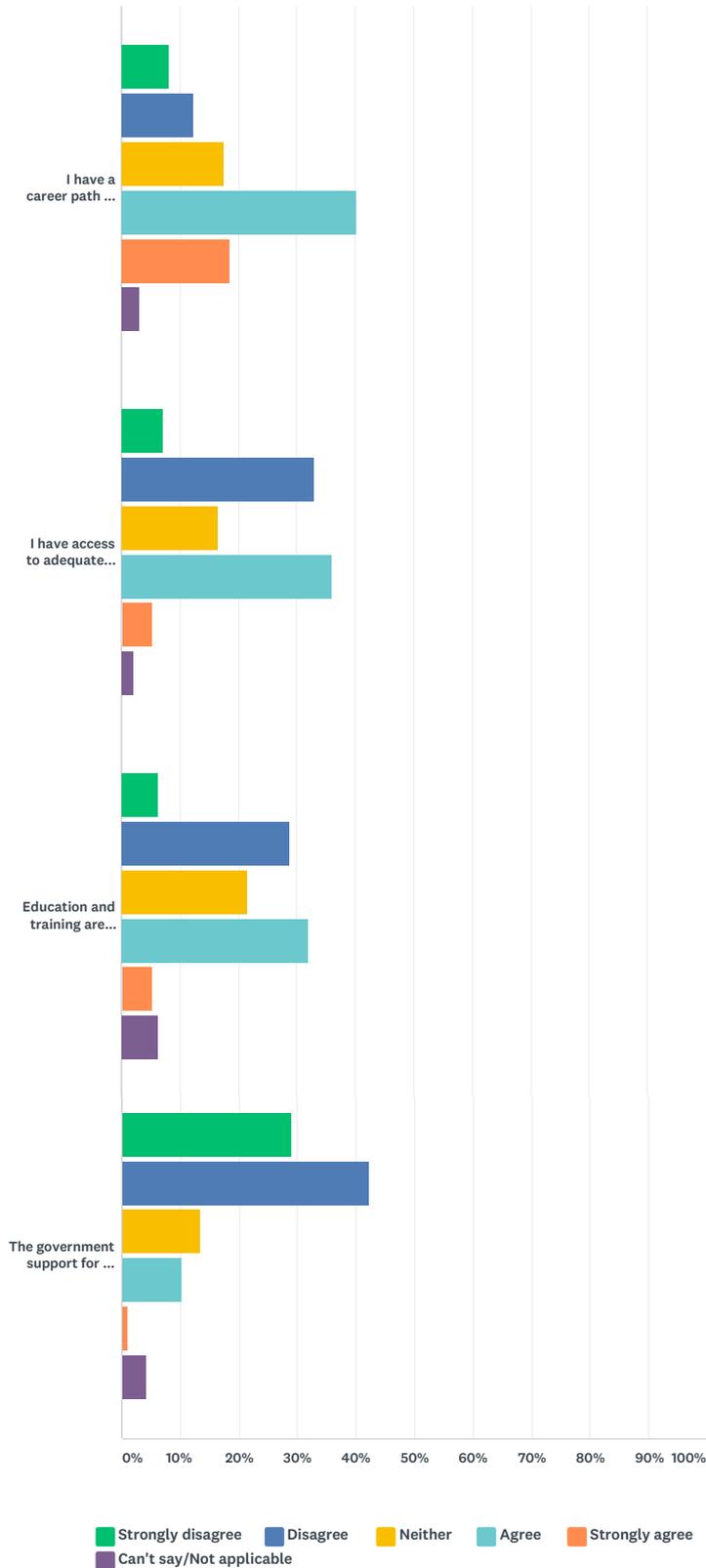
Answered: 188 Skipped: 1,655



	STRONGLY DISAGREE	DISAGREE	NEITHER	AGREE	STRONGLY AGREE	CAN'T SAY/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
My organisation is able to find audiences for its work	1.60% 3	6.91% 13	12.77% 24	45.74% 86	27.13% 51	5.85% 11	188	3.95
My organisation has adequate infrastructure (rehearsal/performance/office space) to deliver its artforms.	21.81% 41	30.32% 57	12.77% 24	22.87% 43	6.91% 13	5.32% 10	188	2.67
My organisation has the ability to be self-funding and autonomous	26.60% 50	37.23% 70	10.64% 20	13.83% 26	3.19% 6	8.51% 16	188	2.25
The government support for the arts is currently working well for my organisation.	17.02% 32	32.45% 61	18.09% 34	19.15% 36	4.79% 9	8.51% 16	188	2.55

Q12 Thinking now about your current main arts organisation, please indicate your agreement or disagreement with the following statements as they relate to South Australia. (Select one answer per row)

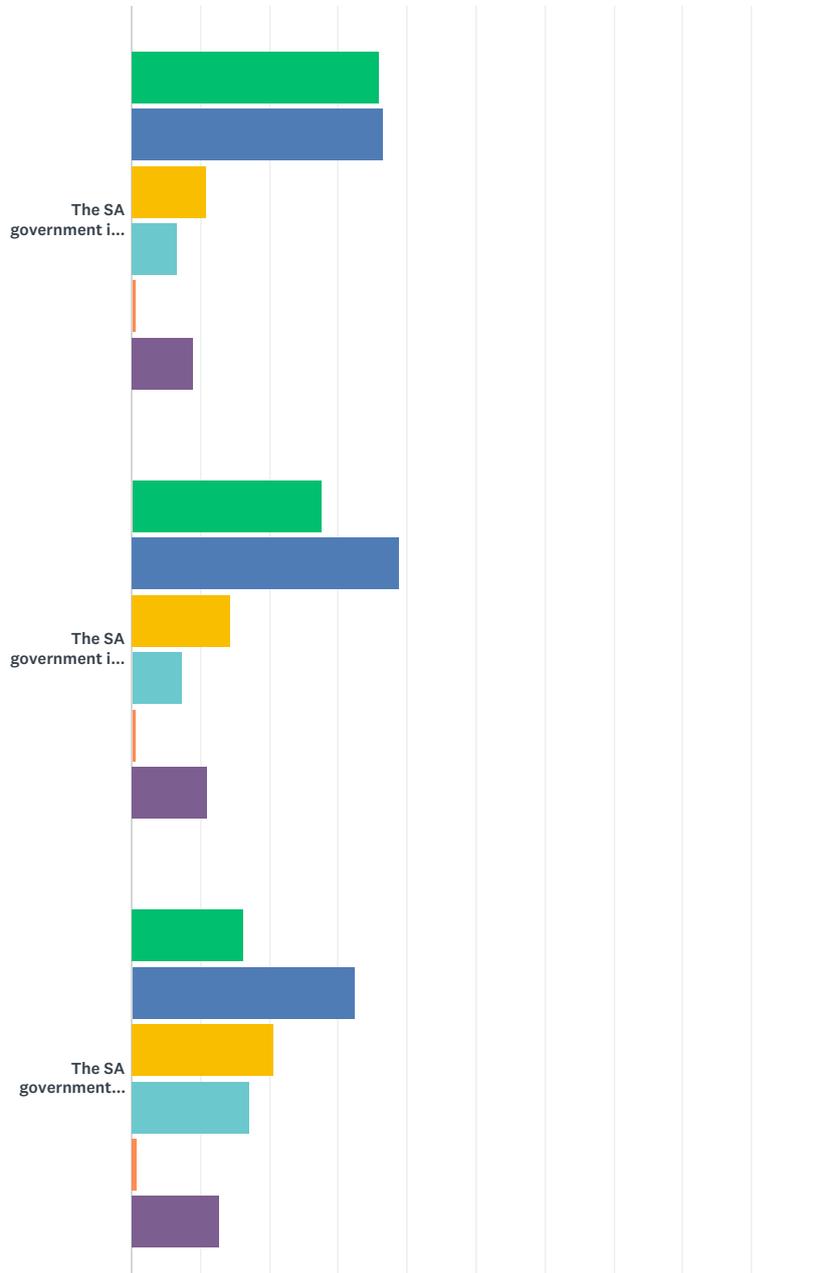
Answered: 97 Skipped: 1,746

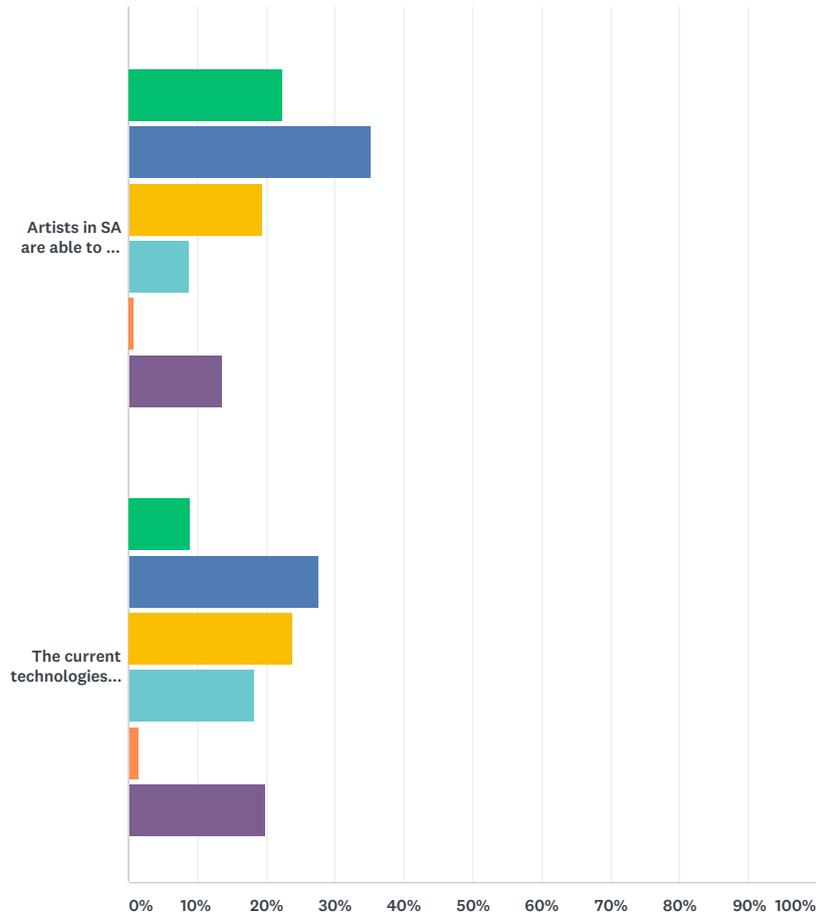


	STRONGLY DISAGREE	DISAGREE	NEITHER	AGREE	STRONGLY AGREE	CAN'T SAY/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
I have a career path in my chosen field of work within South Australia.	8.25% 8	12.37% 12	17.53% 17	40.21% 39	18.56% 18	3.09% 3	97	3.50
I have access to adequate training and education to meet my current job needs within South Australia.	7.22% 7	32.99% 32	16.49% 16	36.08% 35	5.15% 5	2.06% 2	97	2.99
Education and training are available to help me to progress within South Australia.	6.19% 6	28.87% 28	21.65% 21	31.96% 31	5.15% 5	6.19% 6	97	3.01
The government support for the arts is currently working well for people in my occupation.	28.87% 28	42.27% 41	13.40% 13	10.31% 10	1.03% 1	4.12% 4	97	2.09

Q13 Thinking now about how the South Australian government supports the arts generally at a state level, please indicate your agreement or disagreement with the following statements as they relate to South Australia. (Select one answer per row)

Answered: 1,390 Skipped: 453



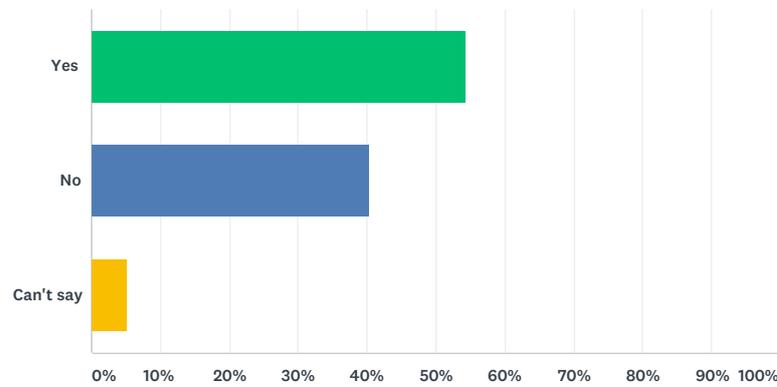


■ Strongly disagree
 ■ Disagree
 ■ Neither
 ■ Agree
 ■ Strongly agree
 ■ Can't say/Not applicable

	STRONGLY DISAGREE	DISAGREE	NEITHER	AGREE	STRONGLY AGREE	CAN'T SAY/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
The SA government is providing adequate financial support through grants and funding to artists	36.04% 501	36.69% 510	10.86% 151	6.62% 92	0.72% 10	9.06% 126	1,390	1.89
The SA government is providing sufficient support to help artists find audiences for their work	27.63% 384	38.99% 542	14.39% 200	7.27% 101	0.58% 8	11.15% 155	1,390	2.03
The SA government supports artists to develop new artforms	16.33% 227	32.37% 450	20.65% 287	17.05% 237	0.79% 11	12.81% 178	1,390	2.47
Artists in SA are able to get a commercial return from their work	22.30% 310	35.11% 488	19.35% 269	8.78% 122	0.86% 12	13.60% 189	1,390	2.20
The current technologies that can be accessed in SA are sufficient to support and enable arts practices	8.99% 125	27.70% 385	23.88% 332	18.27% 254	1.37% 19	19.78% 275	1,390	2.69

Q14 Before today, were you aware of the South Australian Government's Arts Plan? (Select one answer)

Answered: 1,389 Skipped: 454

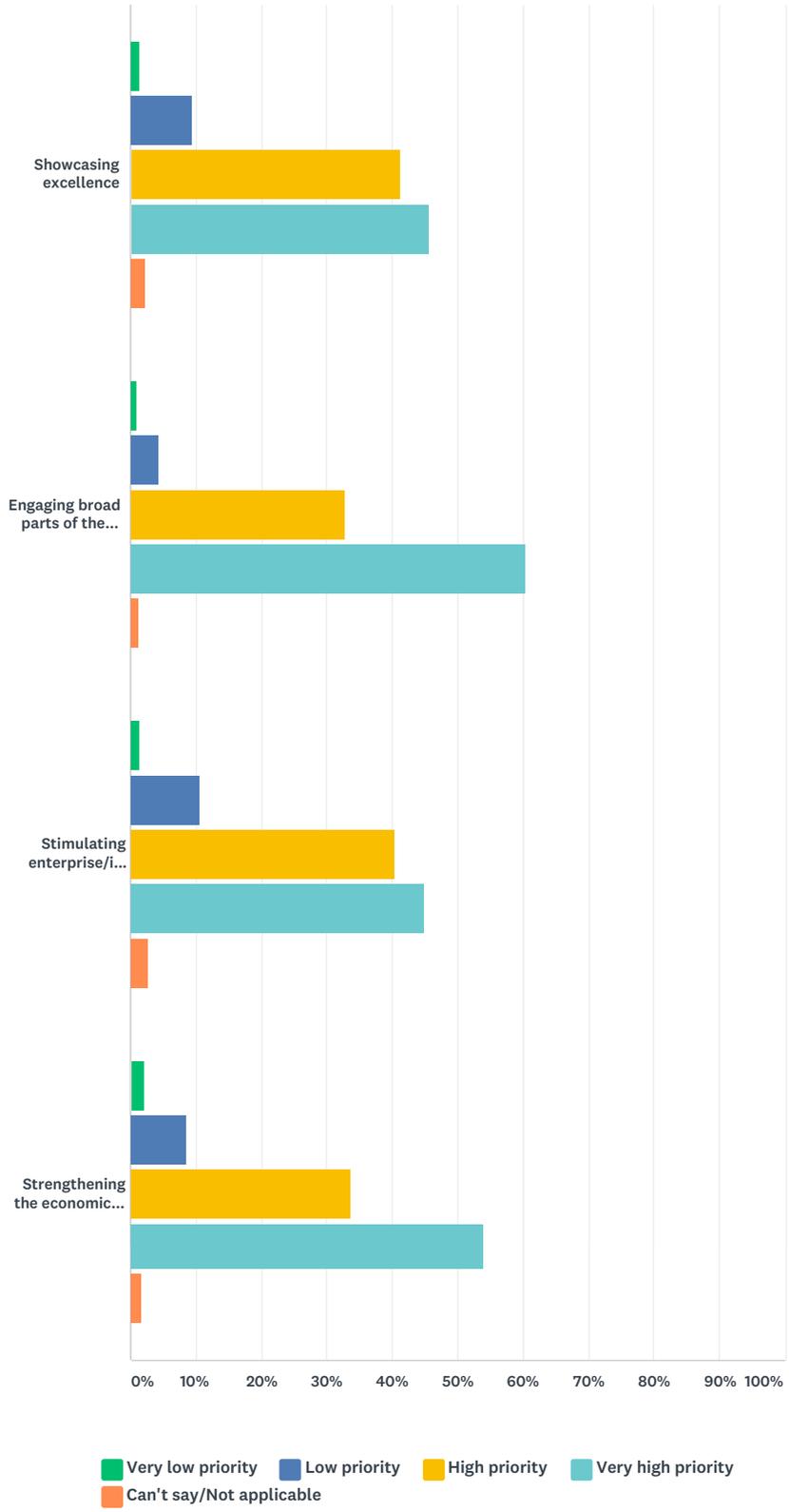


ANSWER CHOICES	RESPONSES	
Yes	54.36%	755
No	40.46%	562
Can't say	5.18%	72
TOTAL		1,389



Q15 What level of priority should the South Australian government give to the following activities in its support for arts, culture and creativity in South Australia. (Select one answer per row)

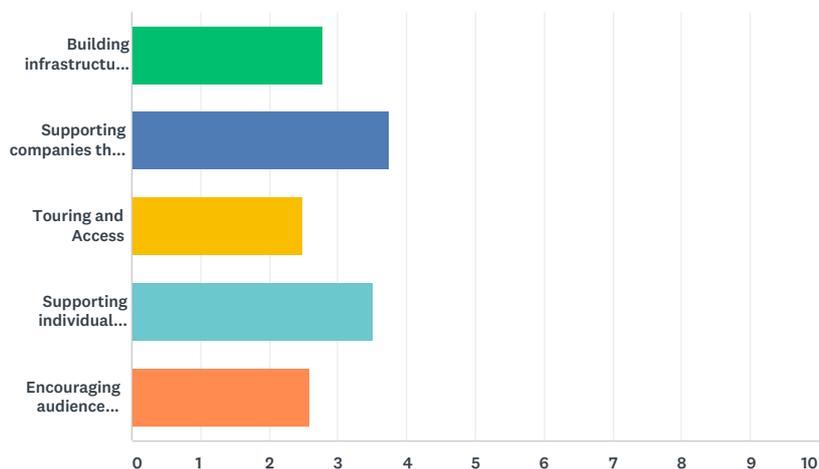
Answered: 1,381 Skipped: 462



	VERY LOW PRIORITY	LOW PRIORITY	HIGH PRIORITY	VERY HIGH PRIORITY	CAN'T SAY/NOT APPLICABLE	TOTAL	WEIGHTED AVERAGE
Showcasing excellence	1.38% 19	9.41% 130	41.20% 569	45.62% 630	2.39% 33	1,381	3.34
Engaging broad parts of the community in artistic and creative works and experiences	1.09% 15	4.34% 60	32.87% 454	60.46% 835	1.23% 17	1,381	3.55
Stimulating enterprise/industry	1.38% 19	10.72% 148	40.33% 557	44.90% 620	2.68% 37	1,381	3.32
Strengthening the economic contributions of arts, culture and creativity to the South Australian economy	2.03% 28	8.62% 119	33.74% 466	53.95% 745	1.67% 23	1,381	3.42

Q16 How should the South Australian government be directing investment in the arts, creative and cultural sectors? Please rank the list below in order of most investment (ranked 1) to least investment. You can drag and drop or use the arrow buttons in each item. If you can't rank any or all items tick the box labelled 'Can't rank' next to the item.

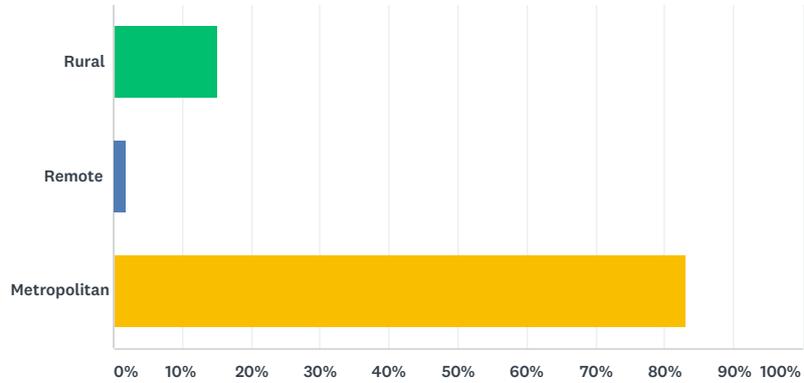
Answered: 1,361 Skipped: 482



	1	2	3	4	5	CAN'T RANK	TOTAL	SCORE
Building infrastructure (buildings / venues / grounds)	19.84% 270	14.62% 199	17.71% 241	14.77% 201	29.90% 407	3.16% 43	1,361	2.79
Supporting companies that deliver artistic or creative outcomes	34.17% 465	27.85% 379	16.83% 229	12.86% 175	5.58% 76	2.72% 37	1,361	3.74
Touring and Access	6.61% 90	12.93% 176	23.44% 319	31.67% 431	22.26% 303	3.09% 42	1,361	2.48
Supporting individual artists	28.80% 392	27.33% 372	17.41% 237	13.59% 185	10.65% 145	2.20% 30	1,361	3.51
Encouraging audience participation	9.26% 126	15.65% 213	22.63% 308	24.17% 329	24.61% 335	3.67% 50	1,361	2.59

Q17 Which of the following best describes your main place of residence in South Australia...? (Select one answer)

Answered: 1,357 Skipped: 486

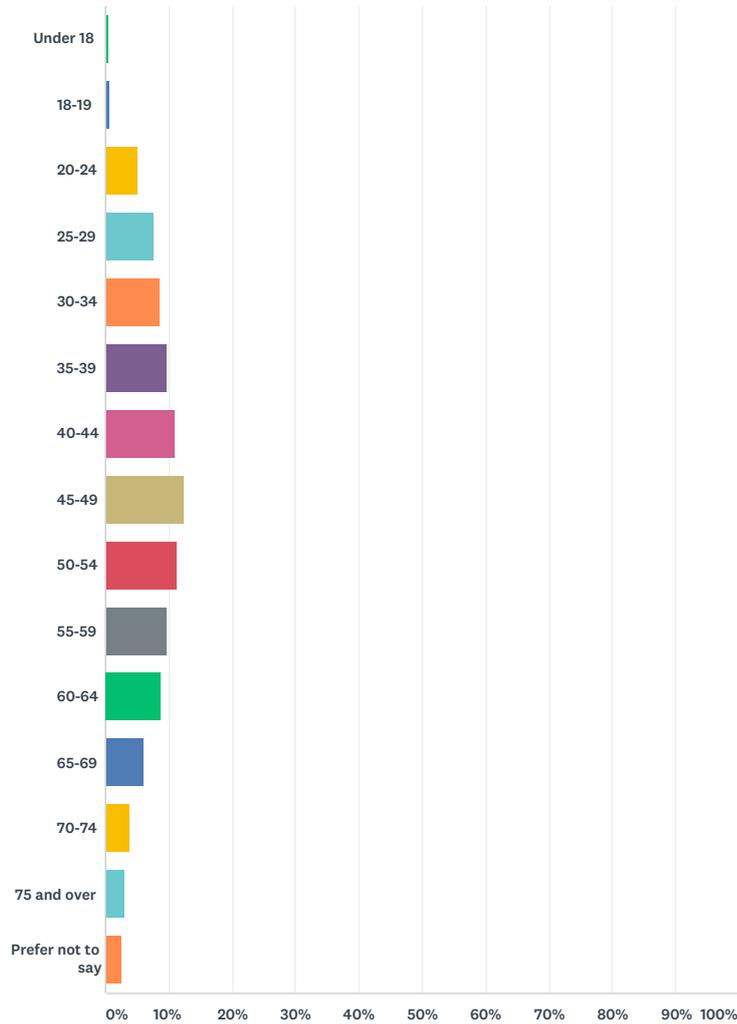


ANSWER CHOICES	RESPONSES	
Rural	15.11%	205
Remote	1.92%	26
Metropolitan	82.98%	1,126
TOTAL		1,357



Q18 Which of these age groups do you fall into? (Select one answer)

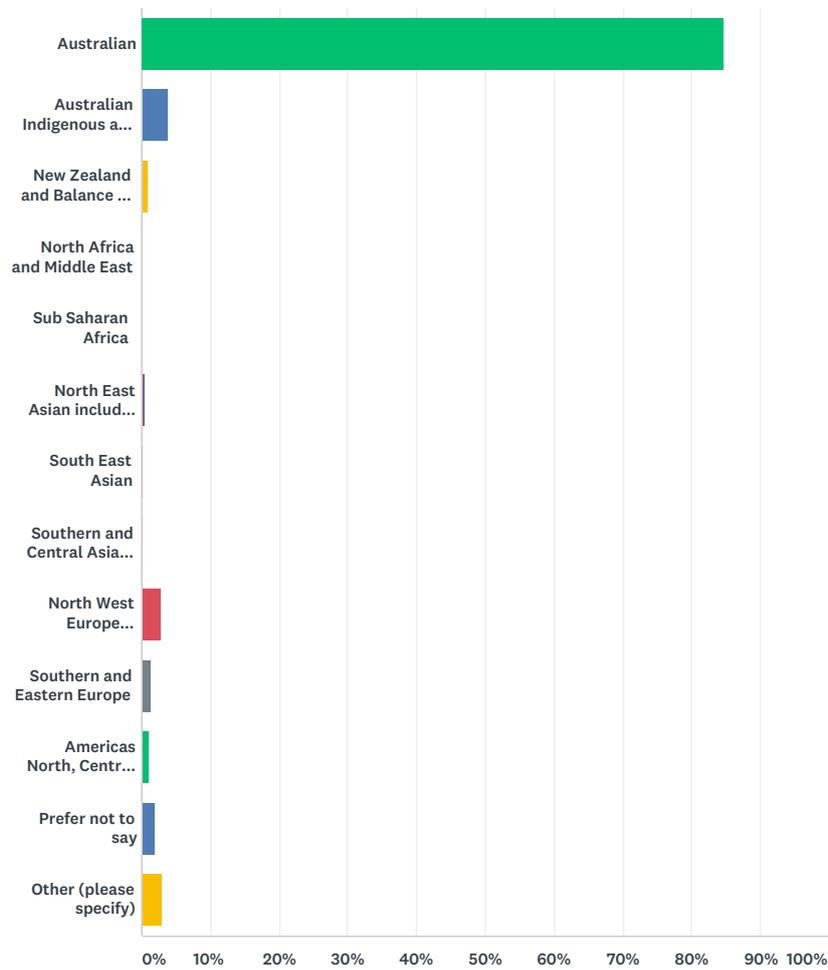
Answered: 1,357 Skipped: 486



ANSWER CHOICES	RESPONSES	
Under 18	0.44%	6
18-19	0.59%	8
20-24	4.94%	67
25-29	7.52%	102
30-34	8.55%	116
35-39	9.65%	131
40-44	10.98%	149
45-49	12.31%	167
50-54	11.35%	154
55-59	9.58%	130
60-64	8.84%	120
65-69	5.97%	81
70-74	3.83%	52
75 and over	2.95%	40
Prefer not to say	2.51%	34
TOTAL		1,357

Q19 Which of these groups do you identify with? (Select one answer)

Answered: 1,355 Skipped: 488



ANSWER CHOICES	RESPONSES	
Australian	84.80%	1,149
Australian Indigenous and Islanders	3.69%	50
New Zealand and Balance of Oceania	0.89%	12
North Africa and Middle East	0.00%	0
Sub Saharan Africa	0.07%	1
North East Asian including Chinese	0.37%	5
South East Asian	0.22%	3
Southern and Central Asia including Pakistan	0.15%	2
North West Europe including Britain and Ireland	2.80%	38
Southern and Eastern Europe	1.33%	18
Americas North, Central, South	0.96%	13
Prefer not to say	1.85%	25
Other (please specify)	2.88%	39
TOTAL		1,355

Q20 What is the postcode where you live?

Answered: 1,350 Skipped: 493

Q21 What is the name of your suburb or nearest town?

Answered: 9 Skipped: 1,834

APPENDIX B CONSULTING TEAM

LEAD CONSULTANTS

Mr Graeme Gherashe and Mr Tony Grybowski

Graeme Gherashe and Tony Grybowski have created a partnership with the objective to strengthen the capacity and power of the Arts, Culture and NFP sectors in Australia and around the world. They help individuals and organisations achieve clear strategies, develop a compelling narrative and ‘language’ that supports renewal and reimagining. Through their work they develop capacity, capability and confident personal; and strong organisational cultures.

The partnership is nimble and flexible and brings solutions, ideas, and tools to individuals, teams, organisations and communities. For this project they curated a team of specialist consultants who share their passion and bring complementary skills and experience to this project.

CONSULTANTS

Dr Sarah Barns

Dr Sarah Barns is a cultural strategist, producer and adviser with close to two decades’ experience in the development of public value frameworks across media, arts, creative industries and urban transformation. With a background in arts policy research and creative industries strategy, Sarah has spent the past decade pioneering the use of digital interfaces to support urban placemaking and interpretation, and has advised a range of local, state and federal government agencies in the adoption of data-driven measurement frameworks to support healthy, sustainable and culturally vibrant communities. Sarah is known for her expertise as a strategic researcher, connector and facilitator, with clients spanning CSIRO/Data 61, the ABC, Create NSW, Urban Growth NSW, the Committee for Sydney, Arup and the Arts Centre of Christchurch.

Dr Claire Scobie

Dr Claire Scobie is an award-winning author and consultant working in a unique way that harnesses the power of storytelling and narrative across a broad range of industries. Through her company Wordstruck, Claire works with ASX-listed businesses, tech start-ups, not-for-profits and arts organisations, to help use storytelling as a strategic business tool. She coaches CEOs, leaders of industry and their executive teams, helping them find the right words to influence, motivate and inspire. Her clients include Evolution Mining, IAG, Coca Cola Amatil, Stryker, Woolworths, the Australia Council, the Smith Family, Lane Crawford, North Sydney Council and Perpetual Limited. Claire is also a senior associate with Cox Inall Ridgeway (CIR), a specialist Aboriginal agency. In this role she assists CIR with narrative development, creative thinking and workshop facilitation across community projects.

Ms Kathryn Deyell

Kathryn Deyell is a cultural diplomacy and arts policy specialist who is passionate about unlocking the value of culture to create a more open and connected world. As an Australian diplomat, Kathryn held senior cultural and public diplomacy roles with the Department of Foreign Affairs and Trade in New Delhi and New York, and went on to lead arts market development in North America for the Australia Council for the Arts. In New Delhi, Kathryn was co-creative director of Oz Fest – the biggest Australian cultural festival ever held in India. Through her consultancy Arvosun, Kathryn advises on international strategy for artists, cultural organisations and governments.

The Consulting Team was supported by the following contractors in the following areas:

ONLINE SURVEY CONSULTANT

Mr Martin O'Shannessy

ARTS REVIEW EDITOR

Mr Peter Morton

CULTURAL SENSITIVITY EDITORS

Ms Michelle Broun

Mr Philip Watkins

DESIGN (THE ARTS AND CULTURE PLAN)

Mr Michael Killalea (Esem Projects)

DESIGN (THE ARTS REVIEW)

Ms Alison Murray

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National and Service Organisations including: Esther Anatolitis of NAVA, Kate Fielding of A New Approach, the staff of The Australia Council for the Arts, and the staff of Creative Partnerships Australia.

International Service Organisations: Magdalena Moreno of IFACCA.

Dr Stephen Arnott, First Assistant Secretary, Arts, Department of Communications and the Arts

Ms Jackie Bailey of the BYP Group

