



Cause4 Arts & Culture Fundraising Benchmark User Guide



Report for: Cause4

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1 Introduction to the dashboard

The dashboard uses data that is required from all organisations who are part of the NPO (National Portfolio Organisation), which is run by ACE (Arts Council England).

Each year Cause4 publishes a report that analyses the annual survey data which ACE publishes: the [Cause4 Arts & Culture Fundraising Benchmark](#) report.

This year we are providing an online dashboard to accompany this report. This replaces the excel dashboards that Cause4 has published previously. It also contains all the years covered by the previous fundraising benchmark reports.

The dashboard allows you to choose your own criteria and data points, depending on your own requirements, so that you can analyse areas that the Cause4 report may not cover in sufficient depth. It also allows you to filter the data and compare it to the national cohort, as well as to any other tailored comparison groups that are relevant.

You can also set up comparisons which are the same as those in the report, and compare your individual data with the appropriate regions, art forms and turnover bands.

This guide will take you through the various attributes of the dashboard step by step, to explain what functions are included and how various functions can be combined.

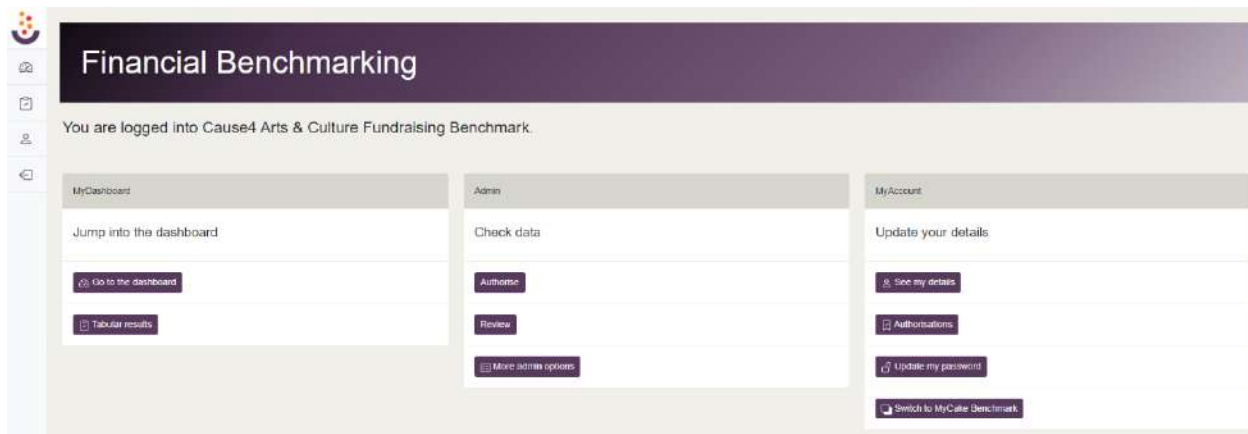
You can log in securely and confidentially, and can export data and run reports on your data comparisons in a variety of formats.

2 Navigating the dashboard

Signing in to the Cause4 Arts & Culture Fundraising Benchmark

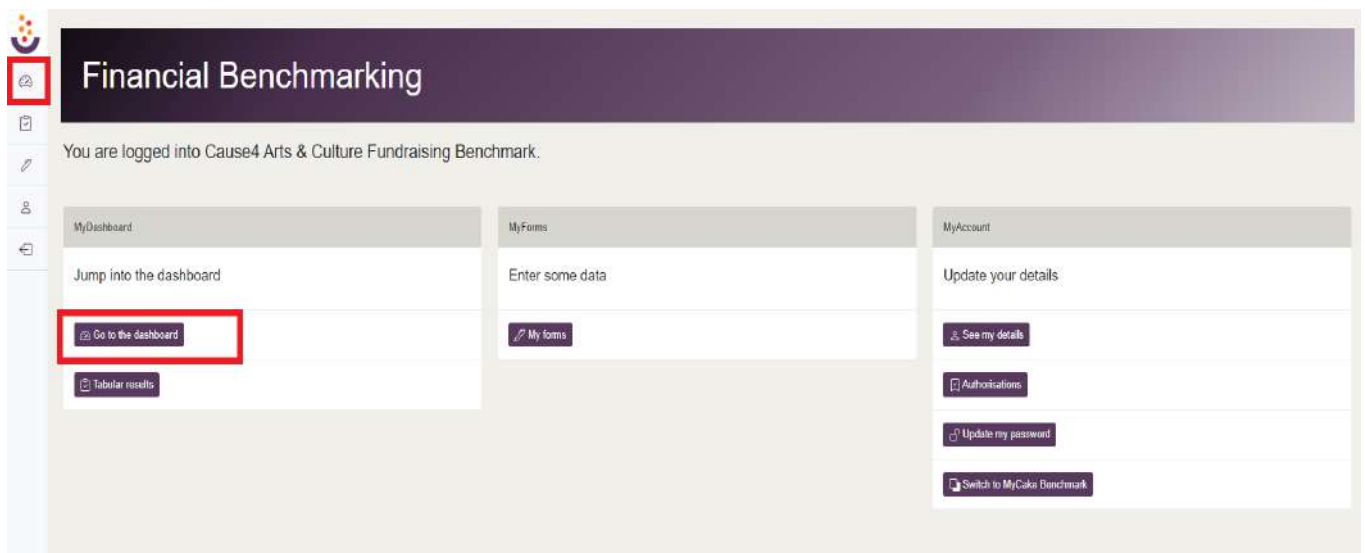
To access the dashboard, sign in using the bespoke link that you have been given or use this link: <https://primenumbers.co.uk/benchmarking/Account/Login/?s=cause4>

This will take you to the **Cause4 Arts & Culture Fundraising Benchmark**.



Finding the dashboard

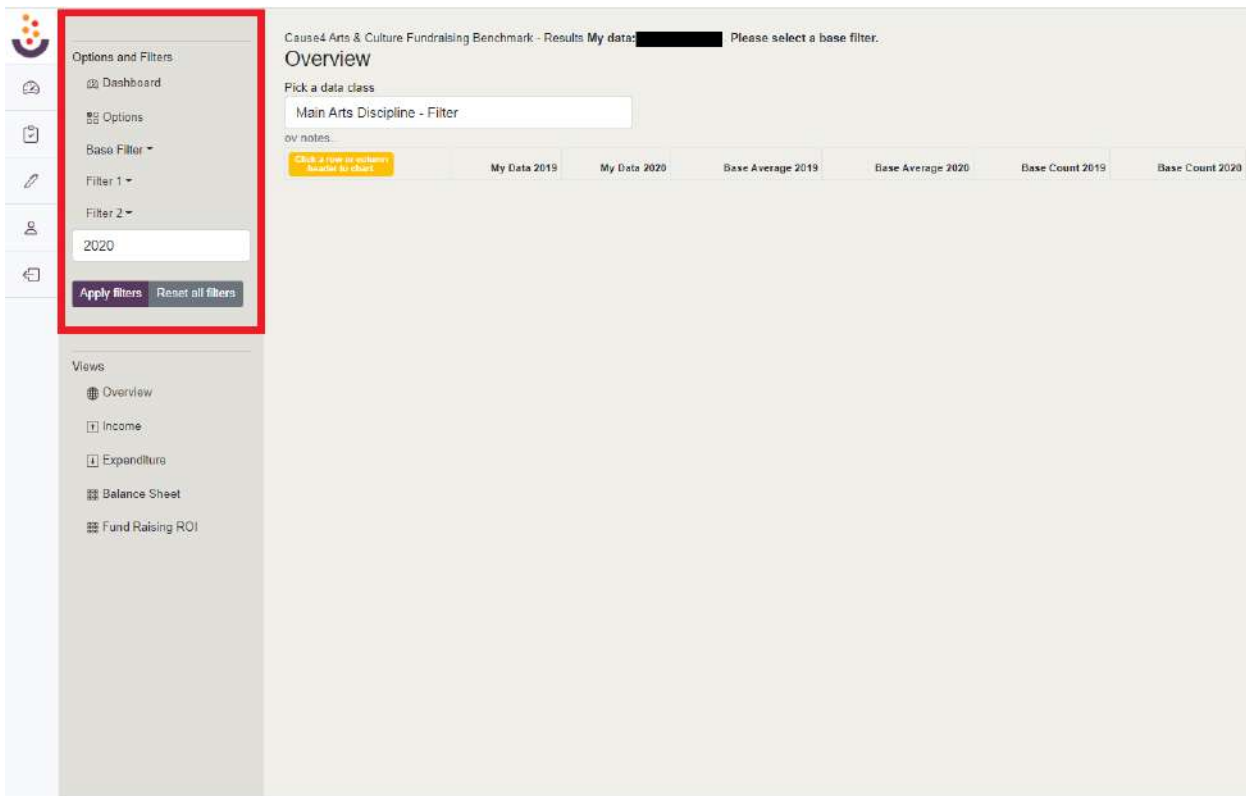
Click on the gauge icon on the left side of the screen or the **Go to the dashboard** button:



3 The Options and Filters section

On the top left of your screen you will find the section **Options and Filters**, which contains the **Dashboard**, **Options**, dropdown menus for **Base Filter**, **Filter 1** and **Filter 2**, a dropdown menu for the relevant year, and buttons for **Apply filters** and **Reset all filters**.

You will use this section to select what kind of data will be shown as well as which groups will be compared.



Clicking on **Dashboard** in this section takes you back to an overview of the information you have selected.

Getting Started

This is a powerful dashboard, with many options and choices for exploring the data, and at first glance it can look quite overwhelming.

To get you started, here is a basic set of filters:

- **Set 2019 as your year in the Options and filters section** (it's the latest year available)
- Ignore Options and the various filters (this will give you the default options that have been set up. These are: all organisations, the latest two years, data shown by income bands)
- **Click 'apply'**
- **Go to the 'Income' section** under the list of views

You will now see the data of your organisations compared to the full cohort of all NPOs. This is useful as it gives you a basic comparison to the national averages.

Going further, if you would like to use the online dashboard while also looking at the Cause4 Arts & Culture Fundraising Benchmark Report, you will need to ensure that they both have the same filters. These are:

- The five regions defined by ACE: **ACE Geographic Filter**
- The type of Artform: **Main Arts Discipline**
- The operation of a Publicly Accessible Building: **Building**
- The Income Band: **Total Income - Income**

You can find these in the dropdown menus for Base Filter, Filter 1 and Filter 2.

3.1 Options

A set of default options (mentioned above) has been pre-set, which should give you the type of information most useful to you.

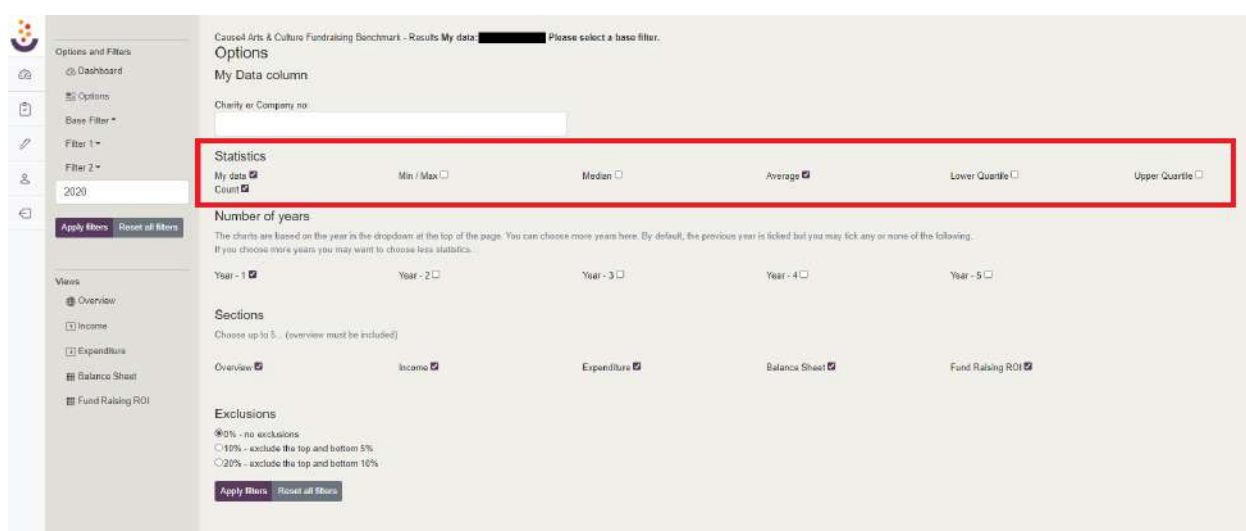
However, as you become more comfortable with the dashboard you may wish to explore filters and selections of your own choosing.

By clicking on **Options** you will be able to select what type of data will be shown in the dashboard. Options is broken down into sub-sections:

3.1.1 Statistics

This gives you the following options:

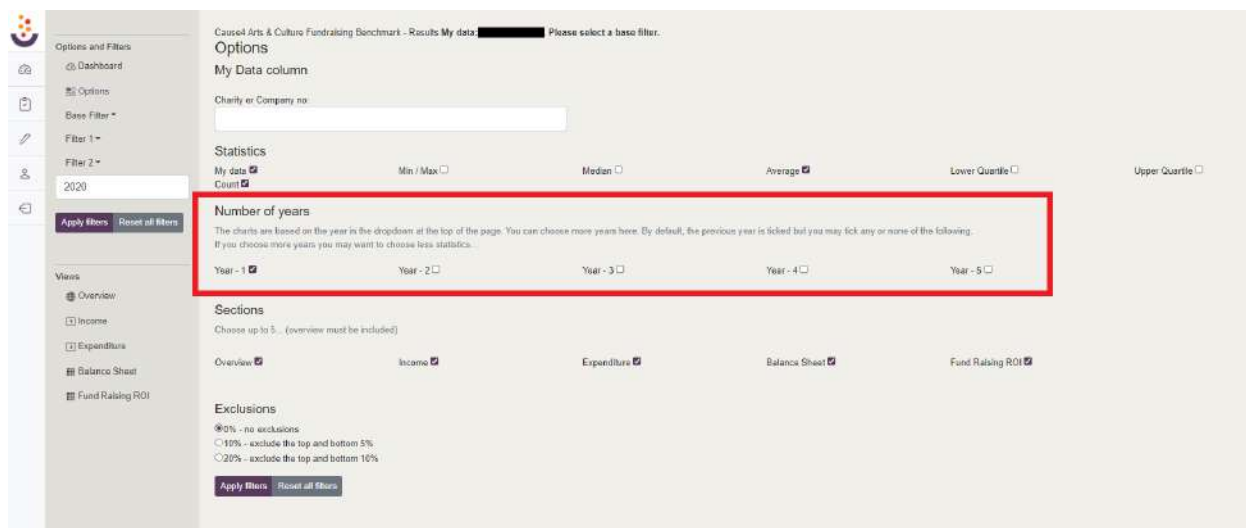
- **My data** (to see your own data)
- **Min/Max** (the minimum and maximum values in the comparison group)
- **Median** (the median of the comparison group)
- **Average** (the mean of the comparison group) - we report means in the Cause4 Arts & Culture Fundraising Benchmark report
- **Lower Quartile** (the value at which the lower quartile starts for the comparison group)
- **Upper Quartile** (the value at which the upper quartile starts for the comparison group)
- **Count** (the number of organisations in the comparison group)



The system has been set up with a series of default selections. We suggest that you use these first when familiarising yourself with the way the benchmark works.

Number of years

This allows you to select multiple years and compare their values. Clicking these options will give you the number of previous years that you wish to compare. For example, if 2019 is your starting year, **Year - 1** will be 2018, **Year - 2** will be 2017, **Year - 3** will be 2016 and so on. If 2018 is your starting year, **Year - 1** will be 2017, **Year - 2** will be 2016 and so on.



You can choose your starting year for comparison by using the dropdown menu in the **Options and Filters** section on the left of the screen. Currently, the dropdown menu is set to the latest year with available data: 2019. Data is also available for the years 2018, 2017 and 2016.

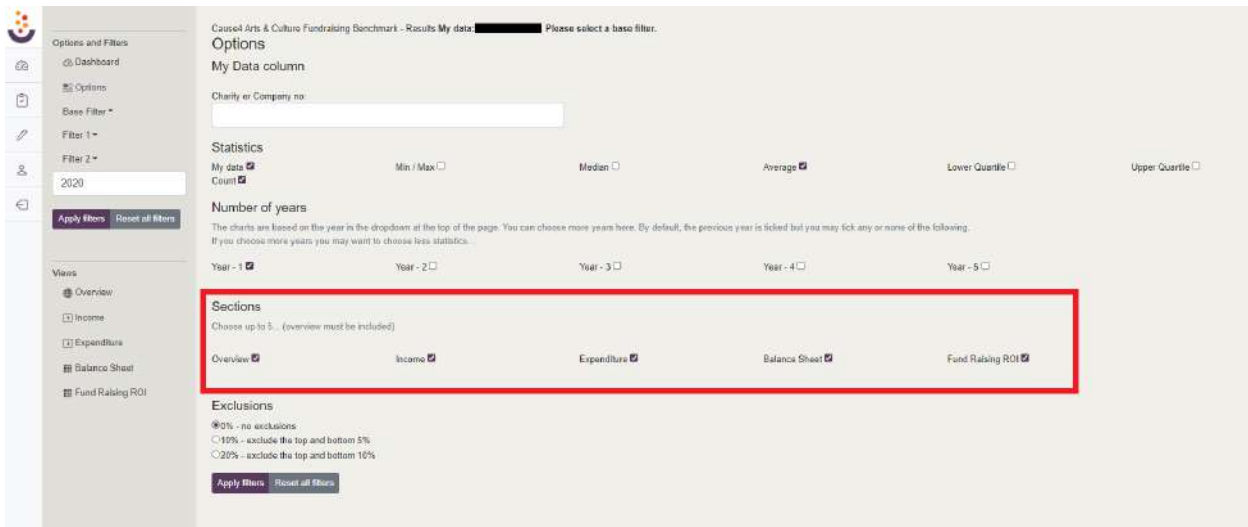


The benefit of being able to look at multiple years is that it means you can see trends in the data over time. An example of this would be that you can look at how the average level of income derived from Trusts & Foundations has changed over the past 3-4 years rather than only look at the latest two years.

3.1.2 Sections

This allows you to select what you will see in the **Views** section. Sections gives you the following options:

- **Overview** (you must select this in order to see the results)
- **Income**
- **Expenditure**
- **Balance Sheet**
- **Fund Raising ROI**
-

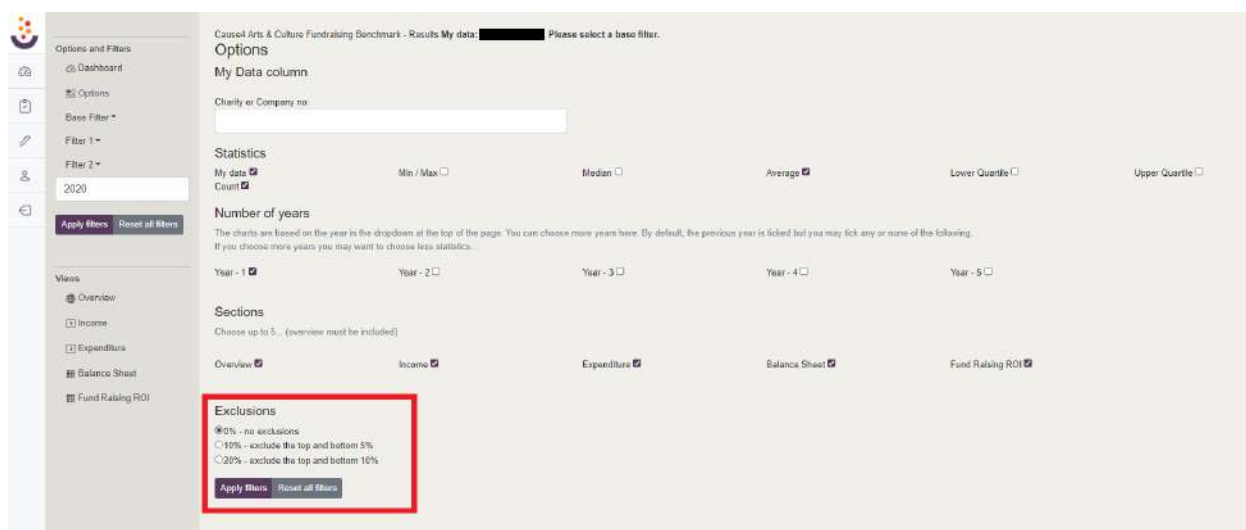


Exclusions

At the bottom of the page you will see **Exclusions**.

This allows you to exclude the extreme values in your data set so you can focus on the main body of values rather than the outliers.

You can define your exclusion parameters by using the buttons for **0% - no exclusions**, **10% - exclude the top and bottom 5%**, and **20% - exclude the top and bottom 10%**.

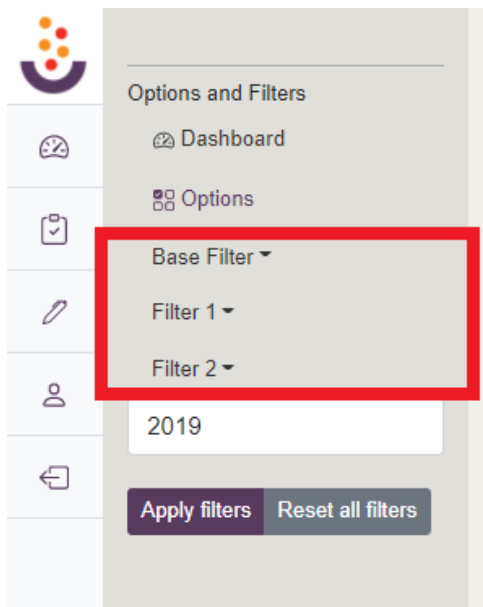


There are a large number of organisations in the NPO cohort, and since these have a variety of different business models in operation there are times when what might feel like a standard metric for your business (for example, private donations), may be a very minor part of some of the business models of other organisations.

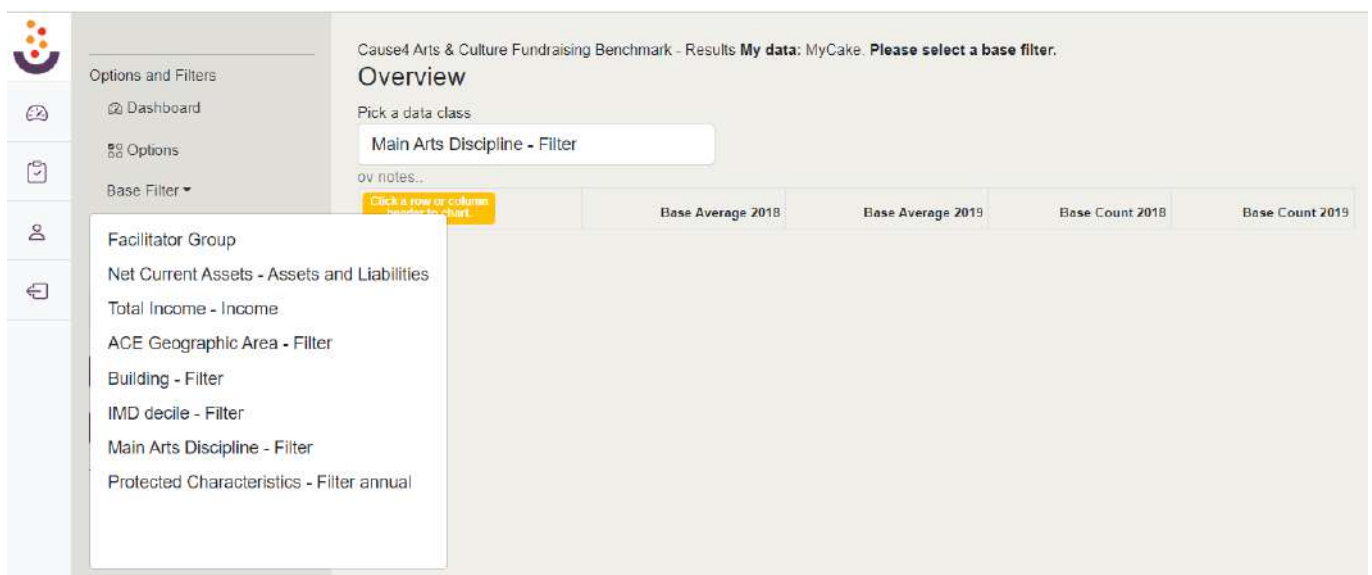
For example, your organisation may rely largely on private donations as income, whereas in a much larger organisation this is a minimal part of their income. This can lead to some correct but odd-looking results, the 'outliers'. The Exclusions function allows you to exclude such oddities.

3.2 Introduction to Filters

In the **Options and Filters** section you will also find **Base Filter**, **Filter 1** and **Filter 2**: filtering tools that you can use to tailor your comparison group(s).



We recommend that you select **Facilitator Groups** as your **Base Filter**, tick the **NPO** box and then press the button **Apply filters**; this allows you to compare your data to the national averages, even when you have no other filters set.

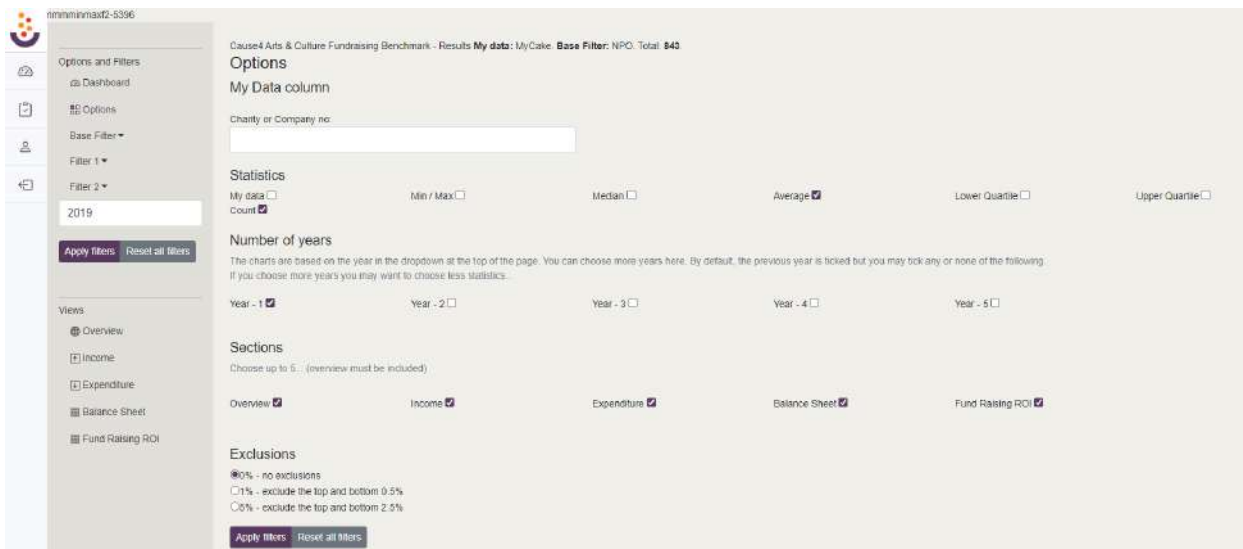


You can check whether your Base Filter has been set by clicking the **Dashboard** in the **Options and Filters** section and looking at the **Overview** page that comes up.

At the top of the page you will see whether a **Base Filter** has been selected or not.

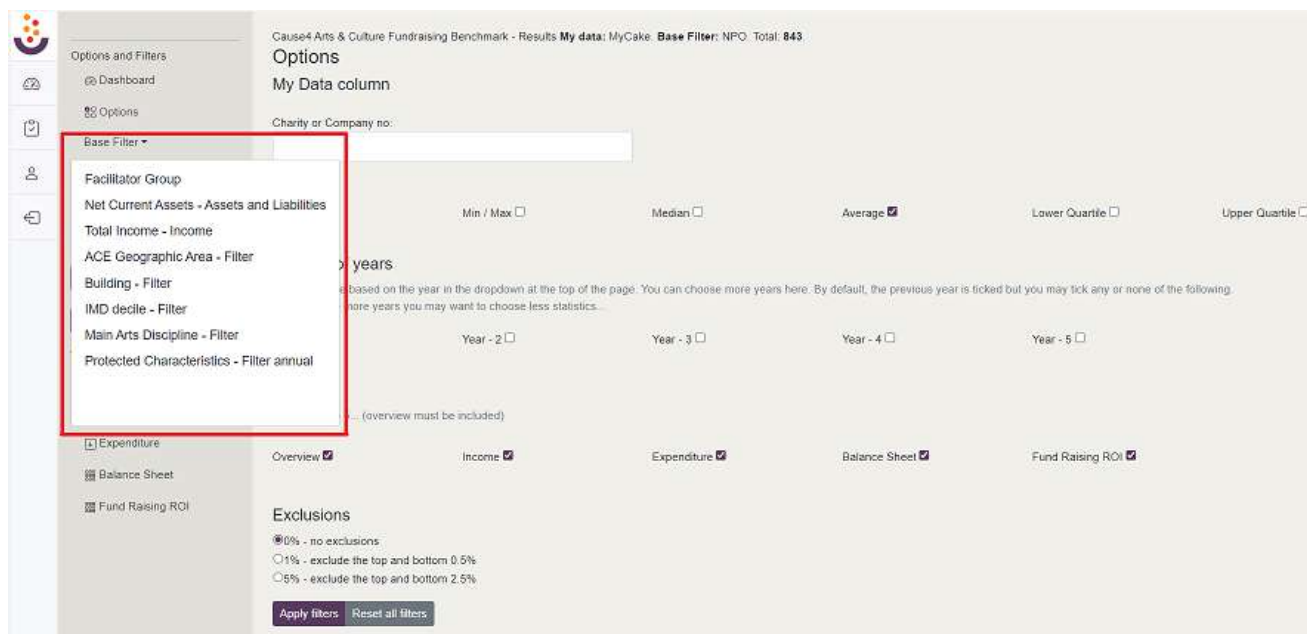


Please note that if you click the **Reset all Filters** button, the NPO as your Base Filter will also be removed.



3.3 Base Filter

The **Base Filter** is the most direct way to create a comparison group: with this feature, you can select one or more characteristics and tailor your base comparison group. You can find the **Base Filter** dropdown menu in the **Options and Filters** section.

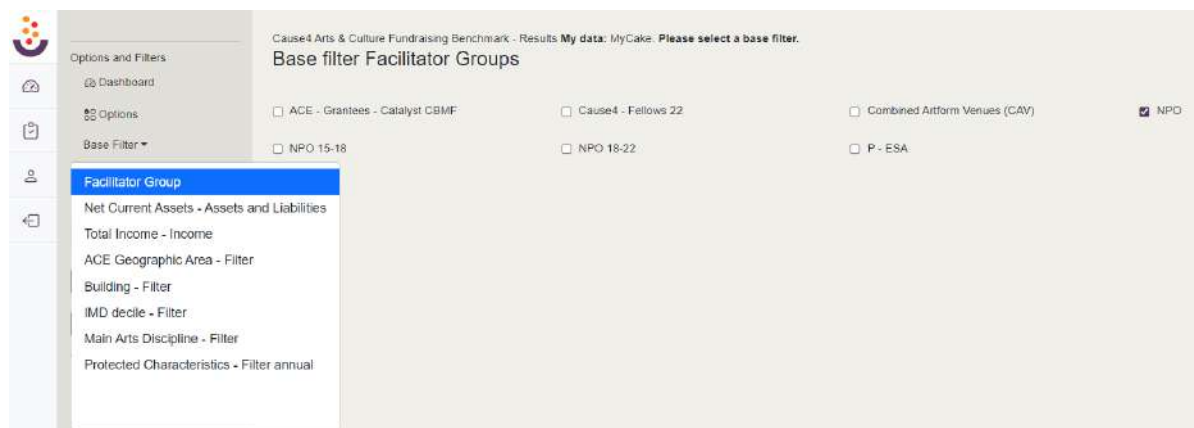


There are 8 different filters to choose from:

3.3.1 Facilitator Group

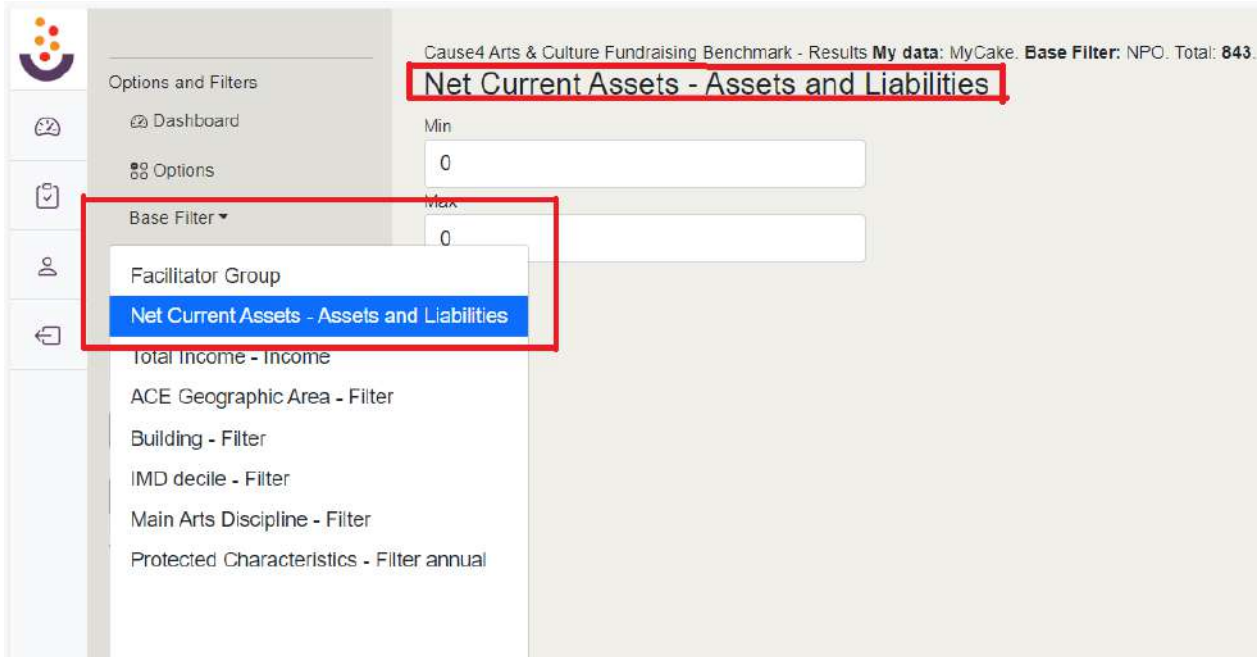
As suggested above, if you choose to set your default as NPO in the Facilitator Group, when no filters are selected the national average is the base comparison group.

You can further define NPO by specifying them as NPO 15-18 and NPO 18-22. These correspond to the cycles of funding given to NPOs in 3- to 4-year periods. For example, NPO 15-18 is for the funding given for the period 2015 to 2018.

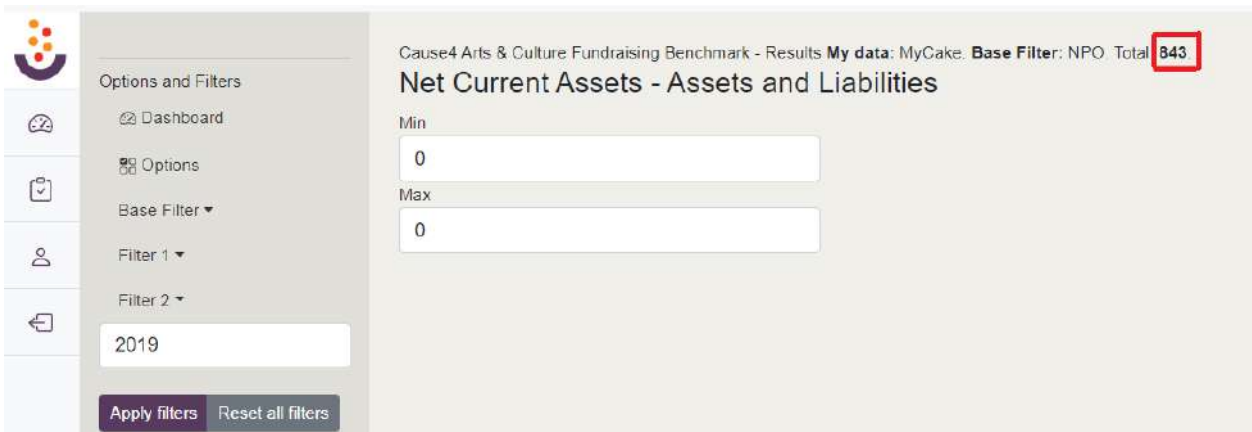


3.3.2 Net Current Assets - Assets and Liabilities

This filter lets you pick organisations within a range of net current assets. This is useful if you wish to compare your organisation against others of a similar size.



For example, the total number of organisations of all sizes in a group might be 843.

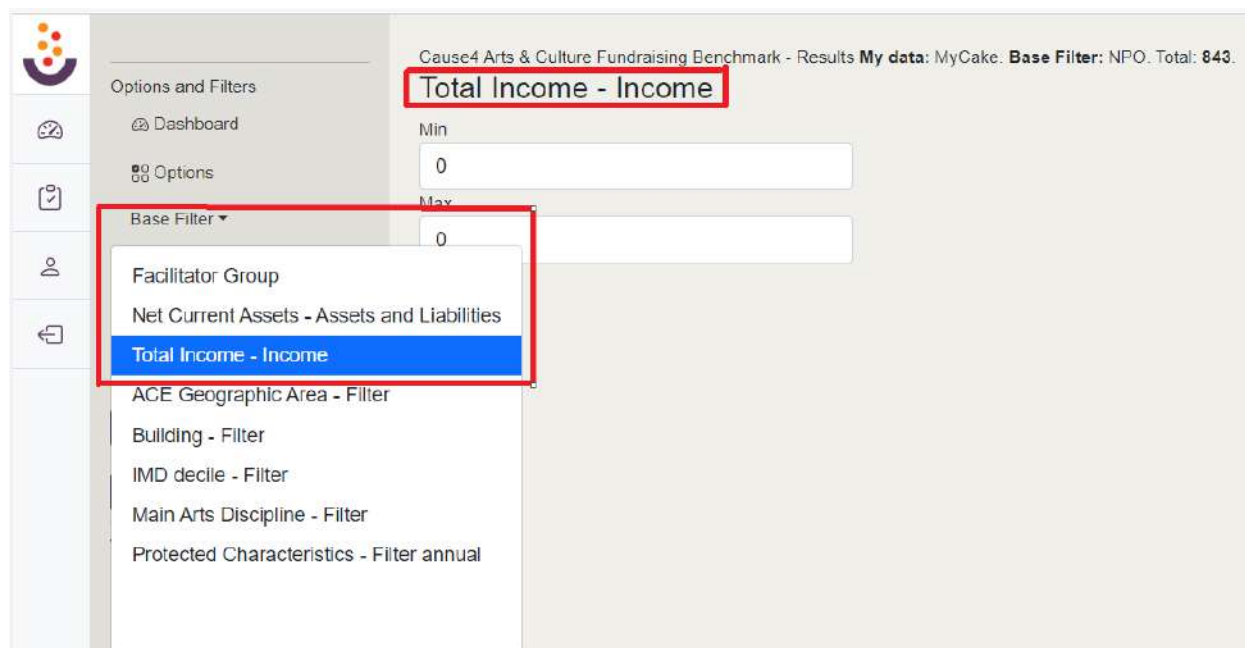


However, by defining the minimum as £500,000 and the maximum as £2,000,000, as shown below, the size of the group decreases from 843 to 135.



3.3.3 Total Income - Income

This works the same as the Net Current Assets filter and allows you to select organisations within a specific total income range.



This is useful if you wish to compare your organisation against others of a similar size financially. We report on the differences in the data by income band in the Cause4 Arts & Culture Fundraising Benchmark Report.

3.3.4 ACE Geographic Area - Filter

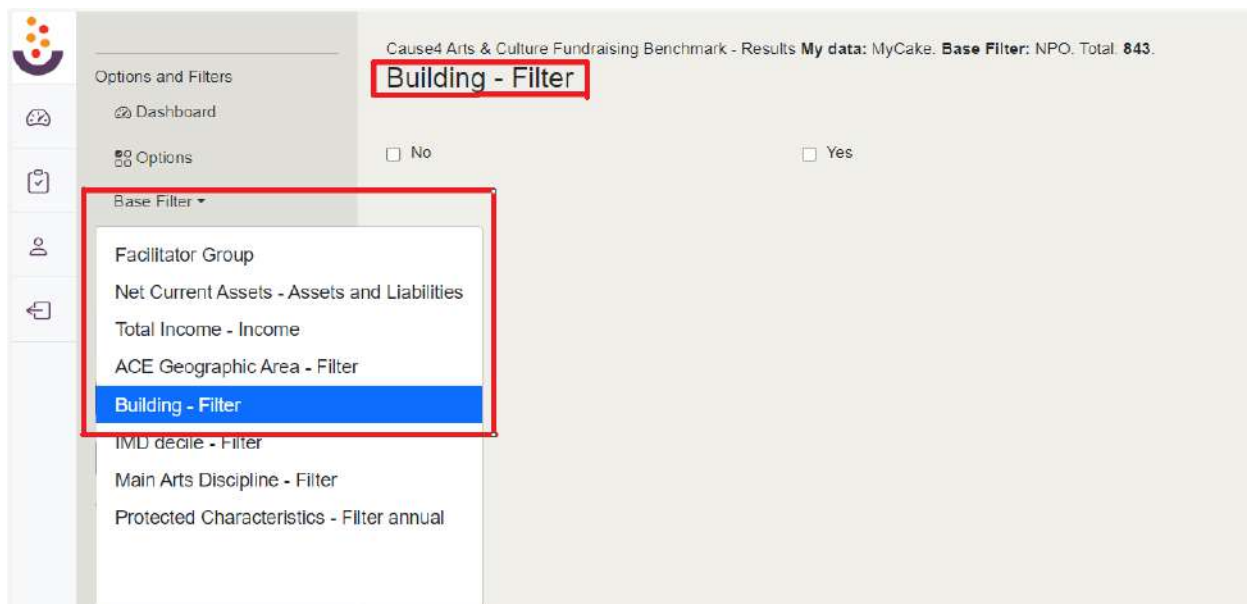
The ACE Geographic Area filter lets you select from five different regions where organisations are located: London, the Midlands, the North, the South East and the South West.



This is useful if you wish to compare your organisation with others in your region.

3.3.5 Building - Filter

This allows you to select between organisations with and without buildings that are accessible by the public.



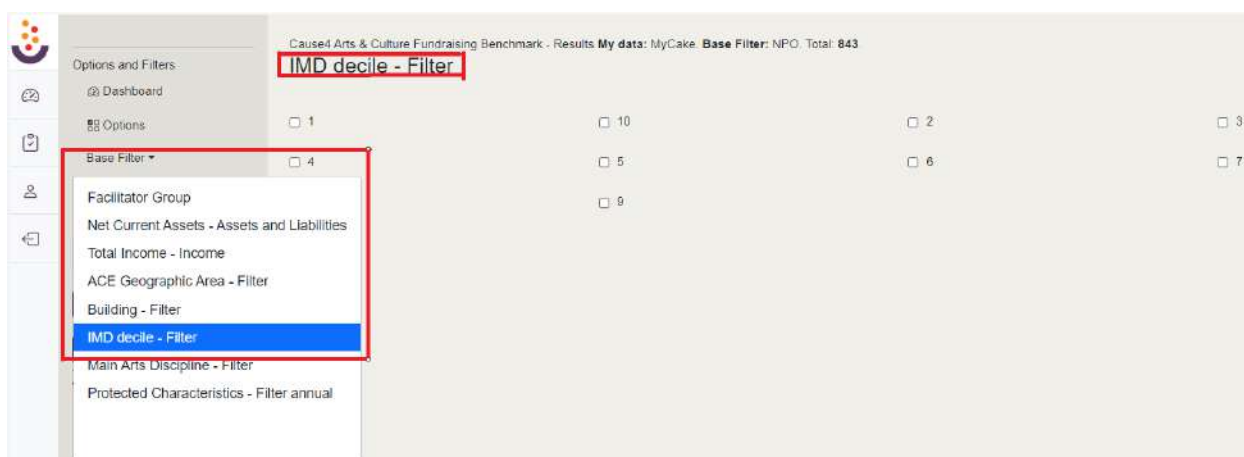
This is useful if you want to compare your organisation to others which run a publicly accessible building.

This may be relevant since running a public building brings with it a particular set of costs in staffing levels (opening and manning it) and maintaining it, as well as in providing accessibility.

These costs are not incurred in the same way if you run an office, studio or storage unit which is not opened to the public on a daily basis.

3.3.6 IMD decile - Filter

The IMD decile, or **Index of Multiple Deprivation**, filters provide ten different options from 1 to 10.



The IMD is used by government to aggregate a number of indicators into one metric, in order to understand deprivation/poverty on a geographical basis.

For the purposes of this benchmark we take the postcode of the registered address of the NPO and attach to it the IMD decile that is reported in the 2019 data published by the UK government. This allows you to compare your organisation to other NPOs who are based in an area of roughly equal deprivation.

Please note this does not look at the mix of your audiences and the deprivation level of the area they are based in. You would need to undertake separate analysis of your audiences to do this.

3.3.7 Main Arts Discipline - Filter

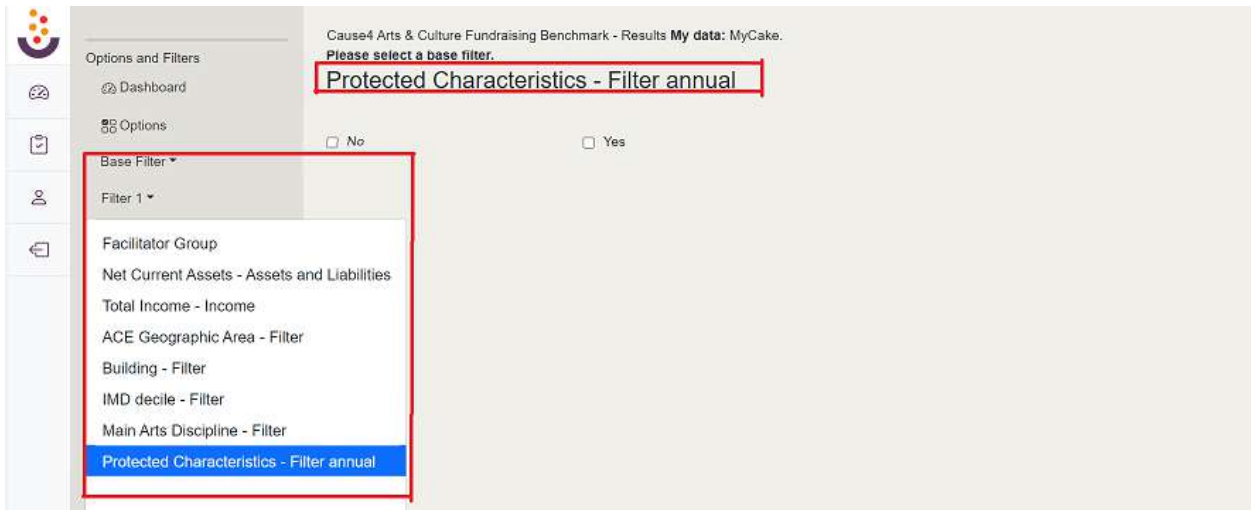
Here you can define organisations involved in different art forms: Dance, Music, Libraries, Literature, Visual Arts, Museums, Combined arts, Theatre, Visual Arts, Not discipline specific.



This is useful because the data can differentiate between the business models of differing performing arts organisations. For example, theatres will often charge a ticket price whereas museums and galleries often have free entry, and it would be important to differentiate between these different organisations with different income models.

3.3.8 Protected Characteristics – Filter Annual

This filter lets you choose organisations that have protected characteristics, such as LGBTQ+ groups or those prioritising working with ethnic minorities. Female led organisations are included in the definition of organisations which are led by an individual with protected characteristics.




3.4 Combining Base Filters

You can apply more than one base filter to create a more accurate, bespoke group with which to compare your organisation.

For example, you want to compare expenditures of your organisation with other Combined Arts organisations in the Midlands that are without a publicly accessible building and have a turnover less than £1,500,000. You can do this by

- Entering 1,500,000 as Max in the Total Income filter
- choosing the Midlands as your ACE Geographic area
- clicking No in the Building filter
- choosing Combined arts in the Main Arts Discipline base filter

This gives you the following:



The screenshot shows the MyCake Finance interface. At the top, a red box highlights the filter configuration: "Cause4 Arts & Culture Fundraising Benchmark - Results My data: [redacted] Base Filter: Total Income - Income <= 1500000, ACE Geographic Area - Filter: Midlands, Building - Filter: No, Main Arts Discipline - Filter: Combined arts, NPO Total: 20". A green box highlights the "Total: 20" value.

The main content is an "Expenditure" report for 2019. It includes a table with the following data:

	My Data 2018	My Data 2019	Base Average 2018	Base Average 2019	Base Count 2018	Base Count 2019
Total Expenditure	100.0%	85.5%	394.1%	134.0%	20	18
Collections - Acquisitions						
Collections - Care and Conservation						
Cost of Generating Funds	3.8%	5.2%	22.2%	4.3%	13	9
Other Costs			54.5%	6.4%	13	18
Overheads	10.7%	8.0%	109.7%	25.7%	20	18
Art_Main Prog	70.3%	56.4%	130.3%	90.7%	20	18
Marketing	3.9%	6.1%	33.8%	5.0%	19	17
Education	11.3%	9.7%	11.4%	8.9%	12	18
Governance	0.1%	0.1%	40.0%	3.3%	16	12
Total Volunteers (FTE)		0.32	1.08	0.89	9	12
Volunteer FTEs per €1M expenditure		0.4	3.5	2.5	9	12

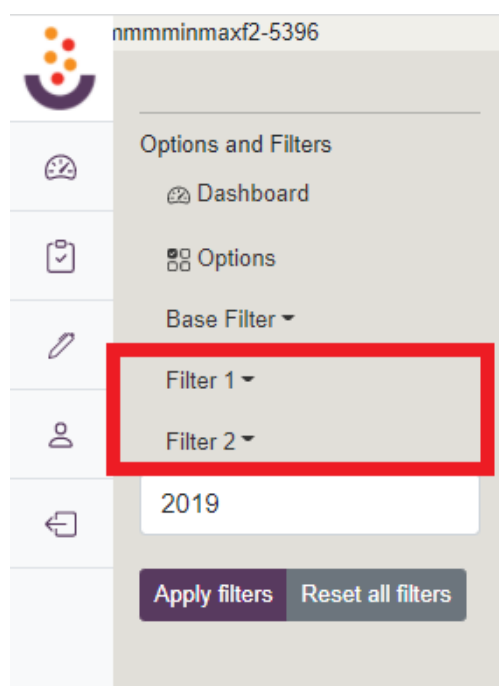
In this example the green box shows the number of organisations that fall into this bespoke category, to which you can compare your organisation.

We suggest that you want at least 20 organisations in any comparison group you use, as below this number the aggregated results (mean, median) risk becoming too skewed by one or two sets of results and are no longer representative of broad norms in a sector.

3.5 Filter 1 and Filter 2

Filter 1 and **Filter 2** are features that allow you to compare your results with multiple comparison groups at the same time.

These filters do not replace the **Base Filter**. Instead they provide additional bespoke groups within the parameters of your **Base Filter**. The dropdown menus **Filter 1** and **Filter 2** are in the **Options and Filters** section under the **Base Filter**.



Filter 1 and **Filter 2** work in the same way as the **Base Filter** and have the same categories. They are used to divide groups that you select in the **Base Filter** into sub-groups. The information from these two filters is shown as columns **Slice 1** and **Slice 2**.

For example, if you want to compare the theatres in the South-West against theatres nationally, you can make **Main Arts Discipline > Theatre** your **Base Filter** and **ACE Geographic Area > South West** your **Filter 1**.

You will then be able to compare the national figures in the Base column against the South-West figures in the Slice 1 column.

Cause4 Arts & Culture Fundraising Benchmark - Results **My data:** MyCake. **Base Filter:** Main Arts Discipline - Filter : Theatre. NPO. Total: **187**.
Filter 1: ACE Geographic Area - Filter : South West. Total: **27**

Balance Sheet

Balance sheet info ...

	Base Average 2018	Base Average 2019	Slice 1 Average 2018	Slice 1 Average 2019	Base Count 2018	Base Count 2019	Slice 1 Count 2018	Slice 1 Count 2019
Fixed Assets as % Turnover	52.8%	49.1%	50.9%	54.5%	184	150	20	20
Current Assets as % Turnover	43.5%	44.1%	38.9%	35.7%	181	169	23	24
Net Current Assets as % Turnover	30.4%	31.2%	31.6%	25.2%	181	169	23	24
Tangible as % Total Assets	20.8%	21.7%	31.0%	25.3%	154	141	19	20
Intangible as % Total Assets	17.1%	10.7%	23.0%	12.6%	18	12	3	1
Unrestricted, Undesignated Funds as weeks of Expenditure	11.6	12.3	8.6	9.2	160	152	21	22
Total Net Assets	£3,126,828	£3,244,733	£2,163,204	£2,113,124	181	169	23	24
Fixed Assets Total	£2,857,900	£2,941,514	£2,040,938	£2,190,042	164	150	20	20

As with the **Base Filter**, you can also apply more than one filter to **Filter 1** and **Filter 2** to create more accurate, bespoke groups with which to compare your organisation.

For example, if you want to compare the theatres in the South-West against theatres nationally, where the theatres have an income of over £500,000, you can

- make **Main Arts Discipline > Theatre** and **Total Income > Min 500,000** your **Base Filter**
- and **Main Arts Discipline > Theatre, ACE Geographic Area > South West** and **Total Income > Min 500,000** your **Filter 1**.

You will then be able to compare the national figures in the Base column against the South-West figures in the Slice 1 column when you are using the various **Views** (see below).

Cause4 Arts & Culture Fundraising Benchmark - Results **My data:** MyCake. **Base Filter:** Total Income - Income >= 500000. Main Arts Discipline - Filter : Theatre. Total: **111**.
Filter 1: Total Income - Income >= 500000. ACE Geographic Area - Filter : South West. Main Arts Discipline - Filter : Theatre. Total: **11**.

Overview

Please note that you can only compare information using **Filter 1** and **Filter 2** that is included

For example, you select **Main Arts Discipline > Theatre** as one of your **Base Filter** criteria. You cannot then select any other **Main Arts Discipline** in **Filter 1** and **Filter 2**, since you have already excluded them in the Base Filter.

mmminmaxf2-5396

Cause4 Arts & Culture Fundraising Benchmark - Results My data [redacted] Base Filter: Main Arts Discipline -

Filter: Theatre NPO: Total: 187
 Filter 1: Main Arts Discipline - Filter: Combined arts: Total: 0
 Filter 2: Main Arts Discipline - Filter: Dance: Total: 0

Income

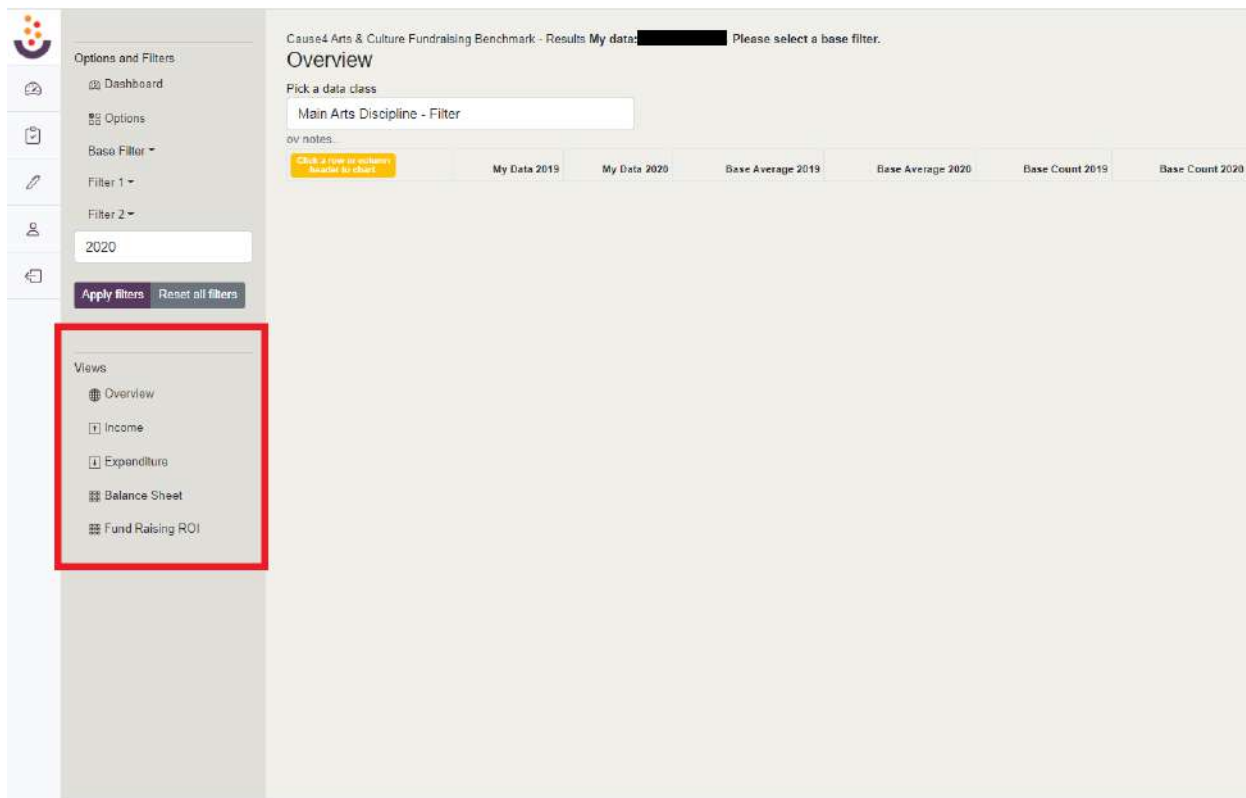
Income notes...

	My Data 2018	My Data 2019	Base Average 2018	Base Average 2019	Slice 1 Average 2018	Slice 1 Average 2019	Slice 2 Average 2018	Slice 2 Average 2019	Base Count 2018	Base Count 2019	Slice 1 Count 2018	Slice 1 Count 2019	Slice 2 Count 2018	Slice 2 Count 2019
Earned Income Total	37.0%	32.7%	42.7%	41.2%					166	178				
Earned Income - Core Activity	28.7%	26.9%	33.3%	32.6%					177	169				
Earned Income - Educational Activity	8.3%	5.6%	6.6%	6.9%					128	126				
Earned Income - of which CYP Specific	3.8%	2.2%	6.1%	6.3%					97	80				
Earned Income - Supplementary		0.6%	0.2%	7.3%					149	132				
Total international earned income			11.3%	13.0%					54	45				
International Inward	20.1%	10.4%	4.1%	2.8%					15	9				

4 Views

Below **Options and Filters** is the section called **Views**. This contains buttons for **Overview**, **Income**, **Expenditure**, **Balance Sheet** and **Fundraising ROI**.

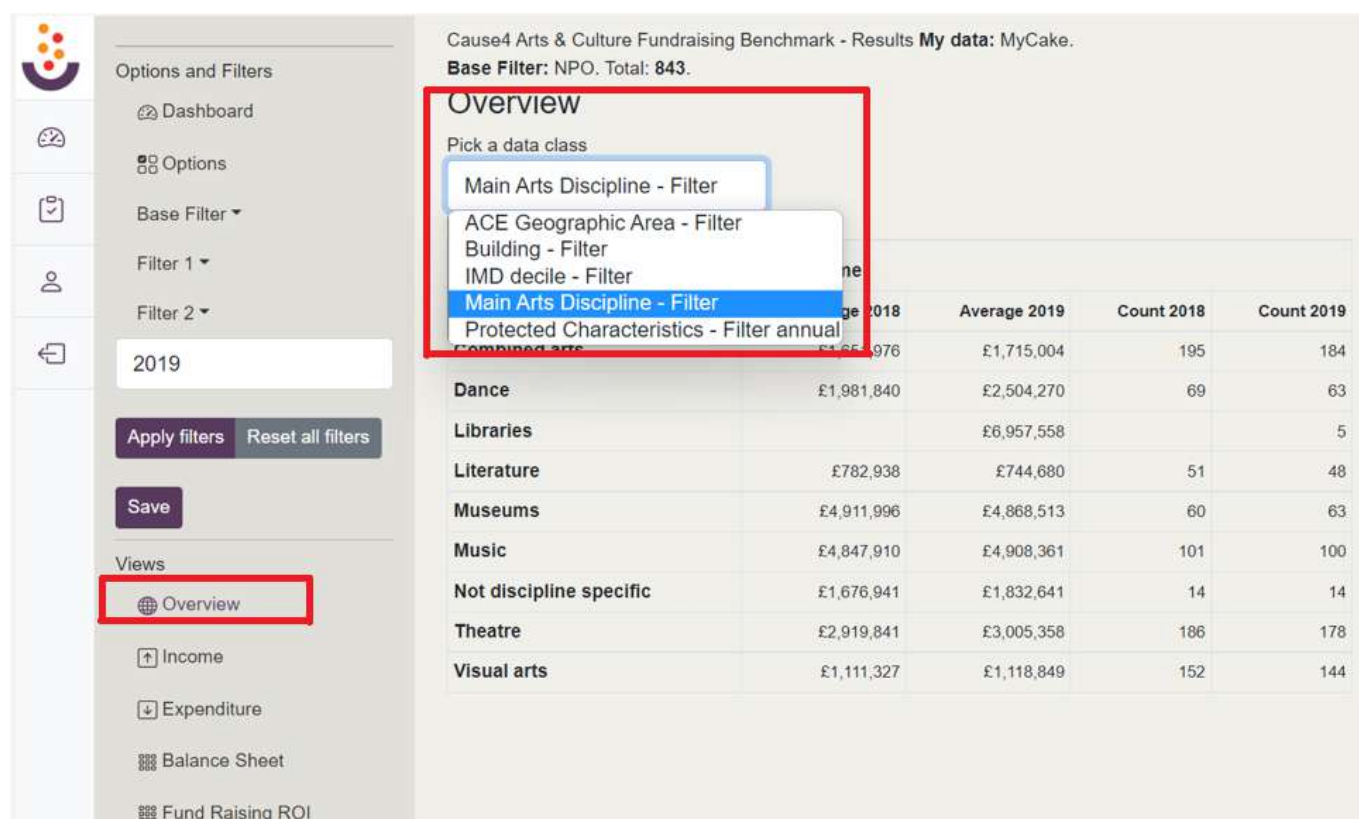
This section is used to show the selected and filtered data in a dashboard format.



The screenshot shows the MyCake dashboard interface. On the left, there is a sidebar with 'Options and Filters' and a 'Views' section. The 'Views' section is highlighted with a red box and contains the following options: Overview, Income, Expenditure, Balance Sheet, and Fund Raising ROI. The main content area displays 'Cause4 Arts & Culture Fundraising Benchmark - Results My data: [redacted] Please select a base filter.' Below this, there is an 'Overview' section with a 'Pick a data class' dropdown set to 'Main Arts Discipline - Filter'. A table header is visible with columns: My Data 2019, My Data 2020, Base Average 2019, Base Average 2020, Base Count 2019, and Base Count 2020. The 'Views' menu is highlighted with a red box.

4.1 Overview

Once you've applied all the filters you require, you can see your bespoke dashboard by clicking **Overview** in the **Views** section. The **Overview** section shows your filtered organisations broken down by data class.



Cause4 Arts & Culture Fundraising Benchmark - Results **My data:** MyCake.
Base Filter: NPO. Total: 843.

Overview

Pick a data class

- Main Arts Discipline - Filter
- ACE Geographic Area - Filter
- Building - Filter
- IMD decile - Filter
- Main Arts Discipline - Filter
- Protected Characteristics - Filter annual

	Average 2018	Average 2019	Count 2018	Count 2019
Combined arts	£1,658,976	£1,715,004	195	184
Dance	£1,981,840	£2,504,270	69	63
Libraries		£6,957,558		5
Literature	£782,938	£744,680	51	48
Museums	£4,911,996	£4,868,513	60	63
Music	£4,847,910	£4,908,361	101	100
Not discipline specific	£1,676,941	£1,832,641	14	14
Theatre	£2,919,841	£3,005,358	186	178
Visual arts	£1,111,327	£1,118,849	152	144

The data class options are:

- **ACE Geographic Area:** different regions where organisations are located. These are London, the Midlands, the North, the South East and the South West
- **Building:** whether organisations have publicly accessible buildings or not
- **IMD decile:** 10 groups based on the IMD decile
- **Main Arts Discipline:** Combined arts, Dance, Libraries, Literature, Museums, Music, Theatre, Visual arts and Not discipline specific
- **Protected Characteristics:** whether organisations have this or not

While the data class menu can be used as a quick way to see an overview of a particular data class, this breakdown does not affect other presentations in the dashboard.

Cause4 Arts & Culture Fundraising Benchmark - Results My data: [redacted] Base Filter: NPO. Total: 643.

Overview

Pick a data class
 Main Arts Discipline - Filter

or notes:

[Click a column header to chart.](#)

	My Data 2016	My Data 2016	My Data 2017	My Data 2018	My Data 2019	Average 2016	Average 2016	Average 2017	Average 2018	Average 2019	Count 2016	Count 2016	Count 2017	Count 2018	Count 2019
Combined arts	£359,572	£422,037	£352,100	£360,102		£2,886,023	£2,849,478	£1,651,976	£1,715,004		159	164	195	184	
Dance	£359,572	£422,037	£352,100	£360,102		£2,105,743	£2,234,039	£1,881,840	£2,504,270		57	57	69	63	
Libraries			£352,100	£360,102				£6,238,558	£6,957,558					4	5
Literature	£359,572	£422,037	£352,100	£360,102		£744,805	£716,727	£782,838	£744,680		46	46	51	40	
Museums	£359,572	£422,037	£352,100	£360,102		£8,033,152	£8,035,807	£4,911,096	£4,868,513		21	21	60	63	
Music	£359,572	£422,037	£352,100	£360,102		£4,847,699	£5,196,381	£4,847,910	£4,908,361		89	91	101	100	
Not discipline specific	£359,572	£422,037	£352,100	£360,102		£1,996,000	£1,419,591	£1,076,941	£1,832,641		3	4	14	14	
Theatre	£359,572	£422,037	£352,100	£360,102		£3,289,024	£3,315,162	£2,919,841	£3,005,358		160	163	186	178	
Visual arts	£359,572	£422,037	£352,100	£360,102		£1,137,104	£1,109,890	£1,111,327	£1,110,849		116	117	152	144	

If the default **Facilitator Group** is NPO and no other **Base Filter** is selected, you can use the data class menu to see the national data by whichever data class option you select.

4.2 Income, Expenditure, Balance Sheet and Fund Raising ROI

With the **Income** view you can see a breakdown of how your income revenue is achieved and compare your income data with the groups you have selected.

If the default **Facilitator Group** is NPO and you select no other **Base Filter**, you can compare your data with the national data.

You can see your data in columns **My Data**, while the **Base** columns show the data you have chosen with the **Base Filter**. Data that you have chosen with **Filter 1** and **Filter 2** are shown in the **Slice 1** and **Slice 2** columns respectively.

Caused Arts & Culture Fundraising Benchmark - Results My data: [redacted] Base Filter: NPO, Total: 843.

Income

Income notes...

Click a row or column header to select.

	My Data 2016	My Data 2017	My Data 2018	My Data 2019	Base Average 2016	Base Average 2017	Base Average 2018	Base Average 2019	Base Count 2016	Base Count 2017	Base Count 2018	Base Count 2019
Earned Income Total	30.9%	24.5%	34.6%	31.7%	35.1%	35.6%	38.6%	35.1%	648	659	822	789
Earned Income - Core Activity	16.0%	17.9%	20.0%	16.8%	25.0%	20.1%	27.1%	25.0%	602	615	776	742
Earned Income - Educational Activity	15.0%	6.6%	9.2%	7.4%	6.8%	6.7%	7.2%	6.8%	430	434	553	527
Earned Income - of which CYP Specific	15.0%	6.6%	9.2%	7.4%	5.6%	5.2%	5.2%	4.9%	305	317	414	359
Earned Income - Supplementary		0.0%	5.3%	7.5%	6.5%	8.7%	9.3%	9.1%	505	521	634	559
Total international earned income	0.7%	0.5%	2.0%	4.9%	7.6%	8.2%	8.7%	8.7%	130	141	186	171
International inward					3.9%	4.1%	4.0%	2.8%	46	52	71	46
ACE Subsidy Total	60.7%	62.7%	54.5%	53.3%	40.5%	40.5%	43.0%	39.3%	651	663	810	798
ACE Subsidy - Grants In Aid Capital					11.9%	13.1%	3.8%		26	26	26	
ACE Subsidy - Lottery Capital					11.3%	14.0%	14.6%		81	32	26	
ACE Subsidy - Lottery Development Funding					3.5%	7.0%	6.8%		118	91	90	
ACE Subsidy - Lottery Project Grants	7.3%	17.2%	7.1%		8.8%	11.6%	12.8%		140	152	157	
ACE Subsidy - Lottery Other Revenue Grant					5.7%	6.1%	3.1%		26	21	16	
ACE Subsidy - Other Non Lottery Funding excl NPO					7.8%	8.5%	12.9%		128	116	111	
ACE Subsidy - NPO	53.4%	45.5%	54.5%	53.3%	34.7%	34.1%	32.9%	34.4%	651	661	680	798
ACE Excl NPO						28.4%	9.6%				430	486
Contributed Income Total	8.4%	12.1%	3.8%	11.0%	14.3%	14.5%	15.8%	15.1%	696	615	757	730
Contributed Income - One Off Donations		0.1%			3.0%	3.2%	3.6%	3.3%	443	455	588	571
Contributed Income - Regular Donations					2.8%	2.5%	2.6%	2.9%	294	285	409	365

Views: Overview, **Income**, Expenditure, Balance Sheet, Fund Raising ROI

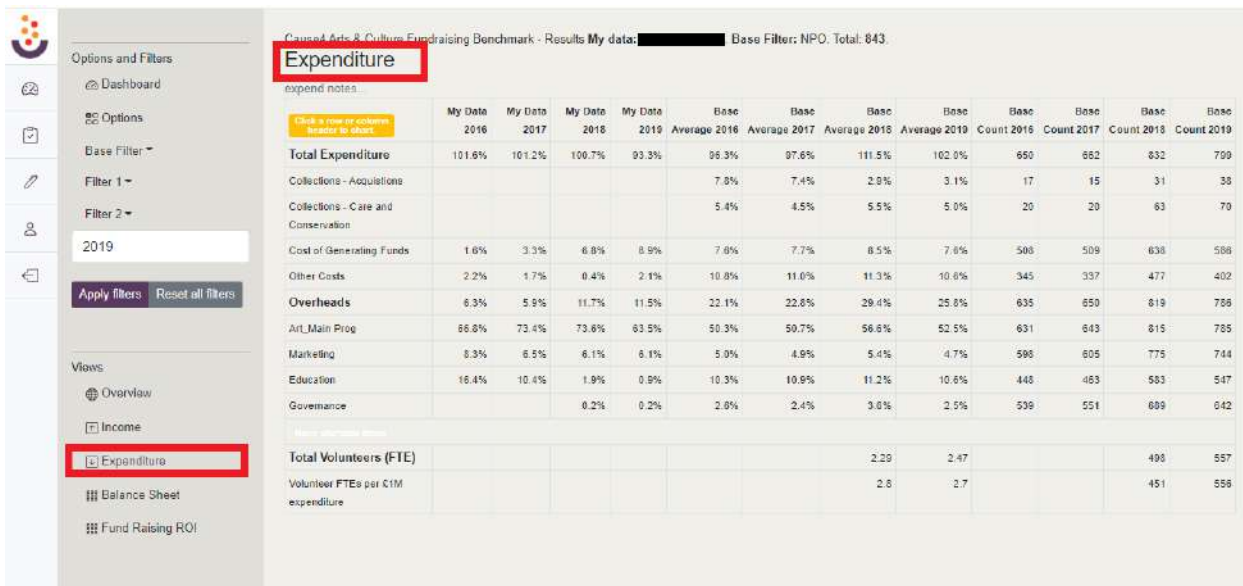
You can also compare your **Expenditure**, **Balance Sheet** and **Fund Raising ROI** data in the same way, by clicking on the different icons in the **Views** section.

4.3 Starting your Benchmarking Analysis

The **Income** page is where most people will start their benchmarking analysis as it allows you to compare the profile of your income (the **My Data** columns) with some/all NPOs.

We suggest that you use the **Base Filter** to pick either the turnover band you fit into or the art form that you are part of and then look at how your mix of income sources is similar to, or different from, your peers. This will allow you to ask questions such as:

- Am I more dependent upon ACE funding than my peers, or less dependent?
- What is a 'normal' level of income from Trusts & Foundations for organisations such as mine?
- What level of income from donations should I sensibly aim for?



	My Data 2016	My Data 2017	My Data 2018	My Data 2019	Base Average 2016	Base Average 2017	Base Average 2018	Base Average 2019	Base Count 2016	Base Count 2017	Base Count 2018	Base Count 2019
Total Expenditure	101.6%	101.2%	100.7%	93.3%	86.3%	87.6%	111.5%	102.0%	650	662	632	799
Collections - Acquisitions					7.8%	7.4%	2.8%	3.1%	17	15	31	38
Collections - Care and Conservation					5.4%	4.5%	5.5%	5.0%	20	20	63	70
Cost of Generating Funds	1.6%	3.3%	6.8%	8.9%	7.6%	7.7%	8.5%	7.6%	506	509	638	586
Other Costs	2.2%	1.7%	0.4%	2.1%	10.8%	11.6%	11.3%	10.6%	345	337	477	402
Overheads	6.3%	5.9%	11.7%	11.5%	22.1%	22.8%	29.4%	25.8%	635	650	819	766
Art_Main Prog	66.6%	73.4%	73.6%	63.5%	50.3%	50.7%	56.6%	52.5%	631	643	815	785
Marketing	8.3%	6.5%	6.1%	6.1%	5.0%	4.9%	5.4%	4.7%	598	605	775	744
Education	16.4%	10.4%	1.9%	0.9%	10.3%	10.9%	11.2%	10.6%	448	463	583	547
Governance			0.2%	0.2%	2.6%	2.4%	3.6%	2.5%	539	551	689	642
Total Volunteers (FTE)								2.29	2.47		498	557
Volunteer FTEs per £1M expenditure								2.8	2.7		451	556

The **Expenditure** page allows for the same sort of comparisons and is designed to shed light on the variation between organisations on topics such as marketing spend, cost of generating funds as well as the largest area of spend – artistic programme.

The **Balance Sheet** page is useful for making similar comparisons about your various assets.

Options and Filters

- Dashboard
- Options
- Base Filter
- Filter 1
- Filter 2
- 2019
- Apply filters Reset all filters
- Views
 - Overview
 - Income
 - Expenditure
 - Balance Sheet**
 - Fund Raising ROI

Caused Arts & Culture Fundraising Benchmark - Results My data: [redacted] Base Filter: NPO Total: 843

Balance Sheet

Balance sheet info

	My Data 2016	My Data 2017	My Data 2018	My Data 2019	Base Average 2016	Base Average 2017	Base Average 2018	Base Average 2019	Base Count 2016	Base Count 2017	Base Count 2018	Base Count 2019
Fixed Assets as % Turnover		1.3%	1.2%	1.3%	1.262 0%	2.728 5%	1.767 0%		559	676	517	
Current Assets as % Turnover		8.0%	4.3%	10.8%	188 0%	293 9%	238 9%		629	796	692	
Net Current Assets as % Turnover		0.4%	0.1%	6.7%	39.3%	72 5%	68 6%		628	796	691	
Tangible as % Total Assets		79.1%	89.4%	16.4%		8 6%	21 4%	34 4%	508	644	574	
Intangible as % Total Assets						17.7%	13 9%	12 1%	61	104	74	
Unrestricted, Undesignated Funds as weeks of Expenditure												
			0.7	0.9	12.7	27.8	40.8		482	644	596	
Total Net Assets	£7,062	£4,682	£28,908		£7,248,407	£10,533,402	£10,151,830		627	766	692	
Fixed Assets Total	£5,583	£4,187	£4,742		£14,277,342	£21,828,577	£18,629,422		559	676	617	

The **Fund Raising ROI** page is useful for making similar comparisons about your fund-raising efforts, the costs involved and the funds raised.

Options and Filters

- Dashboard
- Options
- Base Filter
- Filter 1
- Filter 2
- 2019
- Apply filters Reset all filters
- Views
 - Overview
 - Income
 - Expenditure
 - Balance Sheet
 - Fund Raising ROI**

Caused Arts & Culture Fundraising Benchmark - Results My data: [redacted] Base Filter: NPO Total: 843

Fund Raising ROI

ROI note here...

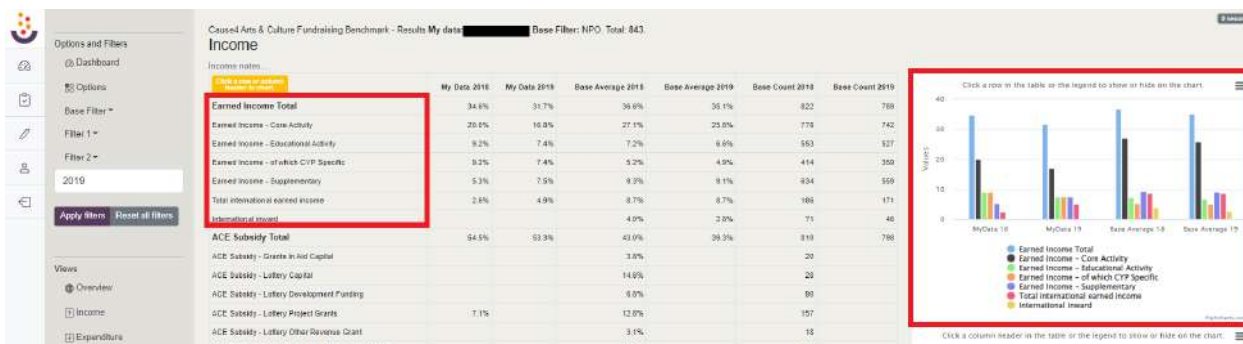
	My Data 2016	My Data 2017	My Data 2018	My Data 2019	Base Average 2016	Base Average 2017	Base Average 2018	Base Average 2019	Base Count 2016	Base Count 2017	Base Count 2018	Base Count 2019
ACE Subsidy Total	£218,130	£284,018	£192,000	£192,000	£338,893	£646,763	£543,536	£559,542	651	663	612	798
Income Contributed Total	£30,220	£50,004	£13,353	£30,703	£356,893	£378,503	£380,968	£372,171	606	615	757	730
Income Other Subsidy Total INCL Capital		£3,060	£25,000	£14,300	£366,282	£368,531	£430,987	£463,442	480	475	629	585
Funds Total			£4,682	£28,908		£3,764,847	£7,833,600	£4,182,575		537	729	664
Total Funds raised	£246,400	£318,582	£230,353	£248,003	£1,255,839	£1,280,754	£1,182,105	£1,238,188	651	663	633	799
Fundraising costs	£5,810	£13,779	£24,000	£32,000	£264,628	£293,841	£249,896	£214,435	508	509	638	588
Net funds raised					£1,245,551	£1,213,885	£1,197,805	£1,277,198	505	506	580	1,166
ROI (Net Funds Raised/Fundraising Costs %)	4,175 4%	2,212 1%	859 8%	668 8%	506 2%	458 9%	517 6%	687 3%	508	509	638	586

5 Creating charts

As well as comparing data in numeric form, the dashboard can also show you the data in chart form.

The yellow banner or box under the data class dropdown menu will tell you which data (column or row header) you are able to see in chart form.

By clicking on one or several rows or columns you will see that the data appears in chart form in the white box on the right of your screen. If you click the rows/columns again, the data will be removed from the chart.



The icon in the top right corner of the charts, shown here in the green box, accesses a menu that allows you to print, save or download the charts, as well as to export the data, in various formats.



This means that you can download key pieces of data/charts for use in your own presentations.

6 A Final Word

We recommend that you save screen shots of your favourite data selections/filters so that you know what you did last time.

You will then be able to replicate your comparisons using the same filters when you come back in a few months, or when the results from the next year are published.