**6-month report prompts**

**Part 1 – Quality of programme delivery & Financial health**

*Please note – the responses to these questions will be assessed*

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| **Quality of programme delivery:** | | | | | | | | | |
| 1. Did you complete the programme of activity as agreed for this period?   *If there were differences, please tell us what changed and why.* | | | | | | | | | |
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| 1. Did you achieve your activity statistics targets (e.g. the number of events, participants, copies, attendees etc you projected in November 2023)?   *If there were differences, please tell us what changed and why.* | | | | | | | | | |
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| 1. How did your organisation deliver to your contracted Investment Feature Outcome(s) in the last six months?   *These can be found in Schedule 1, Section 6.1 of your Kahikatea or Tōtara Funding Agreement. You can just arrange key activities under these headings.* | | | | | | | | | |
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| 1. What targets or goals were you aiming to achieve with your programme? | | | | | | | | | |
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| 1. How did you evaluate whether you achieved these targets or goals? | | | | | | | | | |
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| 1. What were the results of your evaluation?   *Please upload examples in the portal* | | | | | | | | | |
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| 1. Did you achieve the targets or goals you set for your programme? | | | | | | | | | |
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| 1. What did you learn from your evaluation of your programme? | | | | | | | | | |
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| 1. Please self-assess the quality of your programme delivery by underlining the relevant word: | | | | | | | | | |
| Developing | | | On track | | | Thriving | | |
| 1. If you’d like to provide a comment on this self-assessment, please do so. | | | | | | | | | |
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| **Financial Health:**  ***These questions will help us understand the financial health of the wider arts sector as well as your own financial health*** | | | | | | | | | |
| 1. Looking at your **statement of financial performance** (or profit & loss), did you report a surplus or deficit result at the end of 2024? How does this relate to what you projected in November 2023?   *If there was a significant variance, please tell us what led to this result.* | | | | | | | | | |
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| 1. What does this result mean for your organisation in 2025? | | | | | | | | | |
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| 1. Were there any significant variances in revenue and/or expenditure lines from what you projected in November 2023?   *If so, what caused them?* | | | | | | | | | |
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| 1. How would you describe your financial performance over the last three years? | | | | | | | | | |
| Declining | Variable | | | Stable | | | Improving | | |
| 1. Looking at your **statement of** **financial position** (or balance sheet), were there any significant variances from what you projected in November 2023?   *If so, what caused them? What does this mean for your organisation’s future outlook?* | | | | | | | | | |
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| 1. What does your organisation’s Reserves Policy require? | | | | | | | | | |
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| 1. What was the reserves balance you entered in the portal for 2024? | | | | | | | | | |
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| 1. How would you describe the security of your 2025 revenue projections? | | | | | | | | | |
| Risky | | Moderately uncertain | | | Relatively secure | | |
| 1. What is the main reason for this?   *(e.g. confidence in revenue from sales, security of local government or trusts funding, security of corporate sponsorship, likelihood of achieving fundraising goals)* | | | | | | | | | |
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| 1. Do you anticipate having any cashflow issues in 2025? | | | | | | | | | |
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| 1. Please self-assess your financial health by underlining the relevant word: | | | | | | | | | |
| Developing | | | On track | | | Thriving | | |
| 1. If you’d like to provide a comment on this self-assessment, please do so. | | | | | | | | | |
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