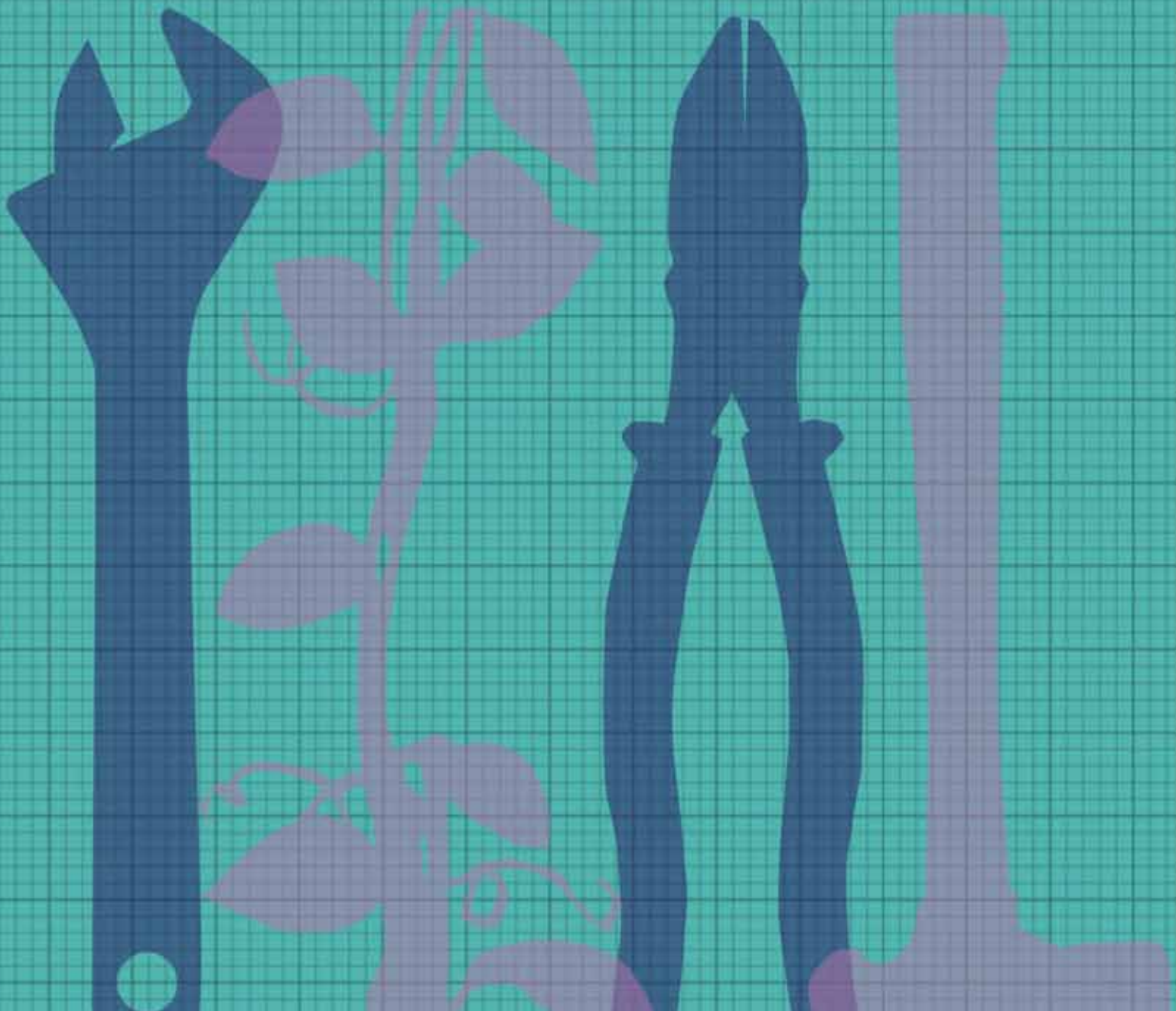


Making value more visible

A summary of the toolkit for making social and economic value more visible



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Introduction

Few, if any, festival organisers took on their role because they love economics, statistics and data analysis. If, however, you love your festival and want more investors to share your conviction that it is a vital part of their work, then this toolkit will help you. It shows you how to create evidence to prove to others the worth you know is there.

This document gives an overview of the process. The full 'Making Value More Visible' toolkit has more detail, includes real examples, and a collection of ready to use exercises. If you are a beginner, start by applying measures to just one or two aspects of your work. Advanced assessors will find a further resources section in the full toolkit.

Why measure?

Preparing for and doing an assessment for your next festival can deliver many benefits, even if you are going to assess just one or two outcomes for some aspects of your work:

Relationships

- diverse stakeholders can be identified and involved
- local residents can be alerted, consulted and brought on board
- causes for complaints can be anticipated and altered

Equality

- the potential to create inequities in impact can be identified and avoided
- potential impacts on vulnerable groups can be explored

Resources

- the need for partners to help deliver or measure can be identified
- the need for paid or volunteer researchers can be established
- clear evidence of impact can be presented to current and potential funders
- volunteers and employees see evidence of their impact, raising their motivation

Effectiveness

- work can be outcome driven
- resources can be targeted appropriately
- activities can be redesigned to ensure maximum positive outcomes

Administration

- appropriate data collection systems can be put in place
- reporting to funders is made easier and more complete
- research work can be timetabled into your project plan and budgeted for

Governance

- the Board can build plans and monitor them on an evidence base
- your accountability can be enhanced

Profile

- the impact of your work can be more clearly communicated to others, leading to raised profile and awareness of your work

Before you dive in

A new project always carries the risk of re-shaping an organisation, of dragging resources and energies away from its core purpose. Four things will help prevent this:

Involvement of a range of stakeholder interests

Before you start, get a small team together (e.g. Board members, volunteers, managers, key funders, maybe other stakeholders). As a Steering Group, they will help you establish 'buy in', monitor progress, and bring expertise, different viewpoints, resources and encouragement to the table.

Setting parameters or scope

If you cannot do a full assessment, then consider measuring just one or two impacts each year. You could look at just one group of people, one area of your work, or pick a theme. Over the years you can build up a library of evidence and reports, develop your own expertise and create an ethos of continuous assessment.

Setting principles

Setting principles keeps you in tune with your organisation and context. For example, you might commit to involving stakeholders at all stages, to being transparent, to recognising negative as well as positive results and to acting on learning.

Checking it is a worthwhile use of resources.

To be worth it, your value assessment project needs to be deliverable within your resources and must produce results you can stand over. If it overstretches you, find more resources or make it more manageable by reducing the scope of the study.

What is Impact?

The impact of your festival means the way it touches on or affects things. Economic impact will be the changes your festival makes to the local economy and social impact will be what it does to local social value.

Impact is not the same as straightforward measuring change, because it is about what *your* festival did. This means removing things that would have happened anyway and things that happened because of things that others did. Changes that happen anyway are called **Deadweight** and making sure it is only things *you* did is called **Attribution**.

When social and economic researchers talk about 'impact' they mean your outcomes after taking into account what would have happened anyway, the contribution of others and the length of time the outcomes last.

Measuring Economic Impact

Your festival attracts a tourist who buys a ticket from you, a drink in the local shop and a room in the local B&B. You can add up his expenditure. **This is direct expenditure.** You, and the shopkeeper and the B&B owner spent some of that money on business supplies and the rest went into your household spending. Adding this **indirect and induced expenditure** to your total is for the more dedicated. It is made simpler by using a figure to multiply your direct expenditure to give a total that takes account of all onward spending. These figures are **multipliers** and there are some readymade ones you can use to work out your own total expenditure. References are in the full toolkit.

Value can also be added for the length of time that the economic benefit lasts. Creating new jobs can bring benefit for years; a big summer event may raise the town's profile sufficiently to attract tourists at Christmas.

You also have to think about things that reduce your impact (whether intended or not). The impact of the festival on the local economy will be less if tourists fill up their cars miles away, or cannot stay locally and so take a room outside of the area, or if all your artists come from another country and the newsagent sources his drinks from abroad.

This is called **leakage** and needs to be subtracted from your impact.

Even small festivals can recognise, if not calculate it. Start to note where it occurs and you are more likely to think of ways to avoid it and get more positive impact for the community you serve.

Measuring Social Impact

What effect do you have on people and communities? The current most popular measures are wellbeing and social capital.

Wellbeing

Wellbeing refers to people's own experience of the quality of their life. It has become the leading umbrella concept under which all sorts of elements are gathered to measure not only how well individuals are doing, but importantly, how they *think* they are doing.

Wellbeing thus includes:

- subjective measures like how well, or safe you actually feel, and
- objective measures, such as the actual level of crime recorded.

It therefore captures elements of the 'external' and the 'personal experience' in a way that seems to resonate well with what many art or community festivals seek to deliver.

Social Capital

Social capital has many definitions; all are about the various connections and levels of trust people have with other people (or groups with groups). There are three different sorts of networks in social capital and you can measure changes in any or all of them:

Bonding – The trust and relationships /with others like you or your community (intra-community relations or social glue).

Bridging – The trust and relationships between individuals and groups who are in other communities (cross-community relations or social oil).

Linking – The relations between those with differing levels of power or social status (power relations or social influence)

Models for assessing impact

There are as many models for assessing social value as there are festivals (well, nearly). Recent reviews of those in common use remark on the lack of consistency, but also recognise the need to adapt measures to local context.

In the UK, the one ‘holistic’ approach that has floated to the top is Social Return on Investment (SROI). This translates social value into ‘hard’ monetary indicators so they can be added onto the economic effects to give an overall measure in one neat ratio, thus, “for every £1 invested £8 of social value is created.”

It can be a complex and time consuming method, if you try to do all of it, but as it is finding its way into the Green Book, the official guidance on how the public sector should conduct economic assessments of projects, it makes sense to adopt its broad approach, it not all of its measures.

Fortunately, an approach puts people and stakeholders at its core so that each festival can adapt it to its own circumstances.

Recognising both the limitations of the methodology and the limited capacity of the sector, this toolkit offers ways smaller organisations can undertake some measurement of outcomes, at a reduced level, but in a manner compatible with the architecture of SROI.

“An SROI analysis produces a narrative of how an organisation creates and destroys value in the course of making change in the world, and a ratio that states how much social value (in £) is created for every £1 of investment.”¹

¹ <http://www.proveandimprove.org/new/tools/sroi.php>

The Stages of Impact Assessment

There are six stages to a SROI analysis, familiar to anyone who has planned a project, although they may have unfamiliar names.



Another impact assessment model is SIMPLE. It has only five elements: Scope It; Map It; Track It; Tell It; and Embed It.² It is very like SROI except for putting a monetary value on everything, then adding and subtracting to give a single figure. It is the monetisation that makes SROI seem very complicated. That and its need to capture *all* value of *all* outcomes.

² www.sel.org.uk Social Enterprise London A SIMPLE Approach to assessing social impact. 2008

It is perfectly valid, and valuable, for small organisations to work through the SROI steps but to leave out turning every benefit into money and doing all the calculations. It is also valuable for smaller concerns to choose to measure just some but not all of their outcomes.

Stage 1: Setting the Scope & Stakeholder Involvement

- Consider why you are doing this.
- Agree which activities, areas, and groups of people you will focus on.
- Check out what figures are already available in your records or those of others.
- Consider how you can match the information you have and will collect to the way official measures are presented so that you can make comparisons.
- Decide what time period you are going to cover.
- Look at the resources you have before shaping the research. If they are limited, think about how your impact study could attract new resources.
- Decide which stakeholders you are going to involve in the study. If you are keeping things manageable by looking at one area, age group, or theme at a time, you should not need to consult all your stakeholders every year.

A few ideas for how your study can raise resources:

- build it into annual funding bids,
- approach a trust interested in organisational development,
- approach a funder that wants more of the impacts you are researching,
- or a funder interested in the groups of people or area you have selected,
- get a sponsor and profile them in meetings, surveys, report, launches,
- try for discount from a research company wanting to break into this area,
- ask one of your current funders to second someone to you,³
- recruit a Board member or volunteer with skills to take on the project,⁴
- explore an intern or research apprentice scheme,
- seek a university student or researcher to do it as part of their course⁵

³ If you are thinking of a sizeable project and can offer payment you might consider the Interchange project run by DFP and <http://www.co3.bz> as a means to attract new skills.

⁴ Ask Arts & Business about recruiting skilled Board members and volunteers from the business sector <http://www.artsandbusiness.org.uk/>

⁵ Enquire at The Science Shop <http://www.qub.ac.uk/sites/ScienceShop/>.
Work Experience Development Unit <http://workexperience.ulster.ac.uk/students/placement.phtml>
and http://www.socsci.ulster.ac.uk/gradschool/policy_projects.html

Stage 2: Mapping outcomes



This is the most important section. It is about preparation; making sure you know where you are going, how you will get there and what you'll need before you set off. Fail to do this bit and you'll end up late, cross and in the wrong place having used all your energy getting there.

Outcomes are the big picture changes; the things that relate to your vision, the important changes that you believe happen because of your festival.

Some impact measurement models start with outcomes they would like to achieve and work backwards to show what you have to do to get there. It is often easier, when you cannot change everything and start anew, to look at what you are already doing and what you believe the outcomes to be, then join the dots backwards so that you can see how one leads to the other.

Whether you call this map a **Theory of Change** or the **Logic Model**, the aim is to highlight the causal relationship between actions, outputs, short-term and long-term outcomes. You are trying to come up with a hypothesis about *how* each of your actions makes an impact so you can test it and show that your work makes a difference.

Before you dive into mapping how your festival turns inputs into outputs, look at what you aim to do in general. What are the changes you want to make in the world? Find your 'mission' or a 'vision' statement and keep it in the back of your mind.

Inputs

If you have a grant, sales, salaries, rent and so forth these are pretty easy to establish and express in monetary terms. Non cash items will need to be valued. There is a standard way of calculating volunteer time in cash values. (See VIVA in the full toolkit).

Outputs

Outputs are a quantitative summary of an activity. For example, 'we provided the chance to dance to 50 people' or 'we read poetry to 20 young people'.

Check application forms, reports, records and you will find some good starting figures. If not, you have identified the need to start recording certain information in the future. There are certain outputs you ought to collect as a minimum. These are often used to describe your work and that description can, in itself, give an idea of the scale of your efforts, even if it does not take into account their effectiveness.

Stage 3: Evidencing outcomes and giving them a value

Outcome Indicators

You are trying to show that your work has caused a change, so you need something that shows you when change has happened. An indicator is simply a way of knowing when change has occurred. By using measureable indicators, you can also tell by how much things have changed.

Before using what seem obvious indicators to you, and especially if you are looking at changes experienced by individuals, you need to ask your stakeholders what is relevant to them. 'How can you tell when other people feel better about where you live?' and 'How do you know when you feel better about where you live?' These types of questions will give you some subjective indicators, and you may be able to mix them with 'hard' or objective ones, (say local house prices, or stress levels if published).

Key amongst your stakeholders will be those you fund you. Make sure you ask them what changes they want to see measured and what indicators they use.

You need not invent indicators for everything. Ones that other people have used are available in an online database.⁶



Collecting data about outcomes

You can collect information yourself (primary research) or find data from research others have done (secondary research). Even if you collect all your own information, secondary data is useful as a comparison. For example, if you find that half the people in the area of your festival are very proud of where they live, you can compare it to the Neighbourhood Perceptions Survey that shows the Northern Ireland average to be 37% of people feeling that way.⁷

The Northern Ireland Statics and Research Agency has Census and Continuous Household Survey information <http://www.nisra.gov.uk/>⁸ as well the Neighbourhood Information Service <http://www.ninis.nisra.gov.uk/>. Belfast City Council has summarised much of its research in Belfast: A Profile of the City 2009 – 2010 <http://www.belfastcity.gov.uk/factsandfigures/index.asp>

There is a list of sources of official statistics in the full toolkit.

⁶ <http://www.sroi-uk.org/vois-database>

⁷ <http://www.ninis.nisra.gov.uk/mapxtreme/DataCatalogue.asp?button=Social> (NIHE Omnibus 2006)

⁸ <http://www.csu.nisra.gov.uk/survey.asp29.htm>

You will need to gather some information about money and experiences directly from people engaged in your festival. You may need to do this over a period of time if outcomes take a while to appear. Longitudinal studies, such as following a small group of artists, participants or spectators can produce rich data and show long term impact over time. They also let you discover any effects that you did not expect, but which show up years after the event.

Data can be collected as numbers (quantitative) and words (qualitative). A mix of statistics and narrative is good for getting points across when you have readers who like differing approaches.

You can turn people's opinions into figures using surveys, the Likert Scale, an easy to use, common example explained in the full toolkit.

Whether you use email, the phone, face to face or other means to gather data will depend on what you need to collect, from whom and what financial and human resources you have.

The full toolkit contains a handy comparison table to help you think about what is best for your specific circumstances, signposts to more help and examples of survey questions to spark ideas.

The full toolkit ***also includes an overview for more advanced assessors of:***

Stages 4: Separating out the Impact (looking at deadweight, displacement, attribution and drop off; and

5: Calculating the SROI ratio.

There are also signposts to new online resources for indicators and multipliers.

Stage 6 - Reporting, Using and Embedding the Results

An impact report should not be boring or dusty. Use the data to tell the story of how change happened, the extent and meaning of it.

Keep to the key points you want to make and put extra information in the back. Most of your stakeholders will only want the headlines, so include an executive summary and make use of selected graphs and graphics to make your point. Perhaps you can find a volunteer to produce illustrative cartoons.

Highlight key points with comparisons, such as before and after figures, comparisons with national wages, or graphic representations, such as showing the size of your audience or artists employed as filling a bus, room, theatre etc.

It is important to make information quick to take in or the bigger story will get lost. You need not print your report. Online versions can work well and you can prepare a one page information sheet for when you need a physical reminder.

To be worth the investment of time, energy, and resources, your research (whether you did the whole SROI analysis or just parts of it) needs to be used.

Use it externally to influence your environment

- Set aside a day for your volunteer team / staff to discuss the findings.
- Have your Committee or Board discuss and approve the report and an action plan. Set a reporting timetable.
- Summarise the key findings into a page or two and send to all volunteers, employees and governors so they can tell people about your impact at every opportunity.
- Quote the key findings when approaching funders.
- Use the results to lobby for helpful policy changes. Show how what you are calling for is supported by the facts. Encourage evidence based policy.
- Put a summary in your annual report – and on your website.
- Launch the research, or release headline findings, to the local media between festivals; it could help you secure some out of season PR.
- Share key findings with other festivals – see what joint learning and problem solving can do.

Use it internally to bring about change

- Set up a way to collect more data for next time.
- Set up a project team/s to work on areas where your impact can be improved.
- Provide updates on key work to the Board / funders / the AGM.
- Create channels to promote the positive impacts you have had (events; newsletters, other PR).
- Create a plan to add more areas of impact evaluation each year.
- Recruit and train volunteers to conduct further research.
- Discuss progress and ideas at staff or volunteer meetings.

Make reporting against the recommendations part of Board agenda and you will soon know that measuring impact was a wise investment.

Exercises in the full toolkit include

The Exercises need input from others to capture more perspectives and knowledge, and ensure others 'buy into', understand and support what you are trying to do.

- Setting the Scope of the study
- Identifying Stakeholders and how to involve them
- Minimum Outputs
- Mapping from Outcomes to Indicators
- Data Collection Methods and Plan
- When to Involve Stakeholders
- Working out the Impact
- Planning the report
- Using the results to get results

Real examples in the full toolkit include

Mapping impact visually – geographic reach

We got an actual map and plotted on it where people were coming from. We could do this for ticketed events where we collected this information at Box Office. We spotted the gaps that were important to us, designed, and delivered multiple targeted approaches in one area - outreach, work in schools, volunteer recruitment and promotion. By plotting the same information on the same map the next year we could see the changes. We know it is not a perfect way to measure impact because not all the change was due to the outreach, but it is a simple and powerful tool to make our reach visible. *Young at Art (Belfast Children's Festival)*

If you do not sell tickets, you could:

- collect postcodes from spectators through a free draw,
- use a guest book,
- have volunteers in the crowd discreetly ask people to mark roughly where they live on a map
- observe how full the buses are coming into the festival area from different routes.

Mapping impact on local businesses

We did not have a research budget but, since starting up, we have always tried to measure and track something of what we do. We try to add a new bit each time, or a new theme. For example, we ask businesses around the Botanic Gardens to let us know changes in their footfall during the festival there. It is not totally scientific because there are many reasons it may change, like the weather or the economy, but the increase is so big every time we do it that you cannot really argue with the pattern. The numbers show clearly that the festival we run means more people go into the local shops. *Artsekta (Belfast Mela)*

Some things you could do to measure impact on local businesses

1. Recruit a small group of people who live around the area, say one on each of the key commercial roads around it. People like to be helpful, though offering free tickets or a special group meal out may help too. People also see the value in gaining valuable work experience too.
2. Bring them together for (maybe over tea and buns), explain what you are doing, the difference their help will make and what you want them to do. Get a group buzz. If possible, get one of the team to volunteer to help lead and co-ordinate it as the contact person for you. Artsekta have developed a 24 point planning meeting, and invite some shopkeepers along to ensure that what they are asking is feasible.
3. As they live locally, ask them to identify four or five key shops near them that will be open during festival. Make sure you have a good spread and more than one of each across the areas, e.g.
 - Supermarket
 - Newsagent / Corner shop
 - Chemist
 - Café
 - Restaurant
 - Household goods
 - Taxi company (could be one or two covering but not based in the area)
4. Give them the before and after questions you want asked, an outline script and help them practice by asking each other.

Example questions might be:

 - Record the number of people in the shop at 8am, 10am, 12pm, 2pm etc the Saturday* before the festival, the Saturday of the festival and the Saturday after. * Use the day/s your festival is on)
 - Record taking for the week before, week of and week after the festival and report the percentage change. (This avoids them having to share actual figures)
5. Give volunteers something to give shops that take part, tickets, a free advertisement, recommendation in the programme.
6. Set dates and ways for them to report in on shops confirmed to take part, the before and the after information.
7. Keep the volunteers in the loop, recognise them and send them a copy of the report so they can see what their information contributed.



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