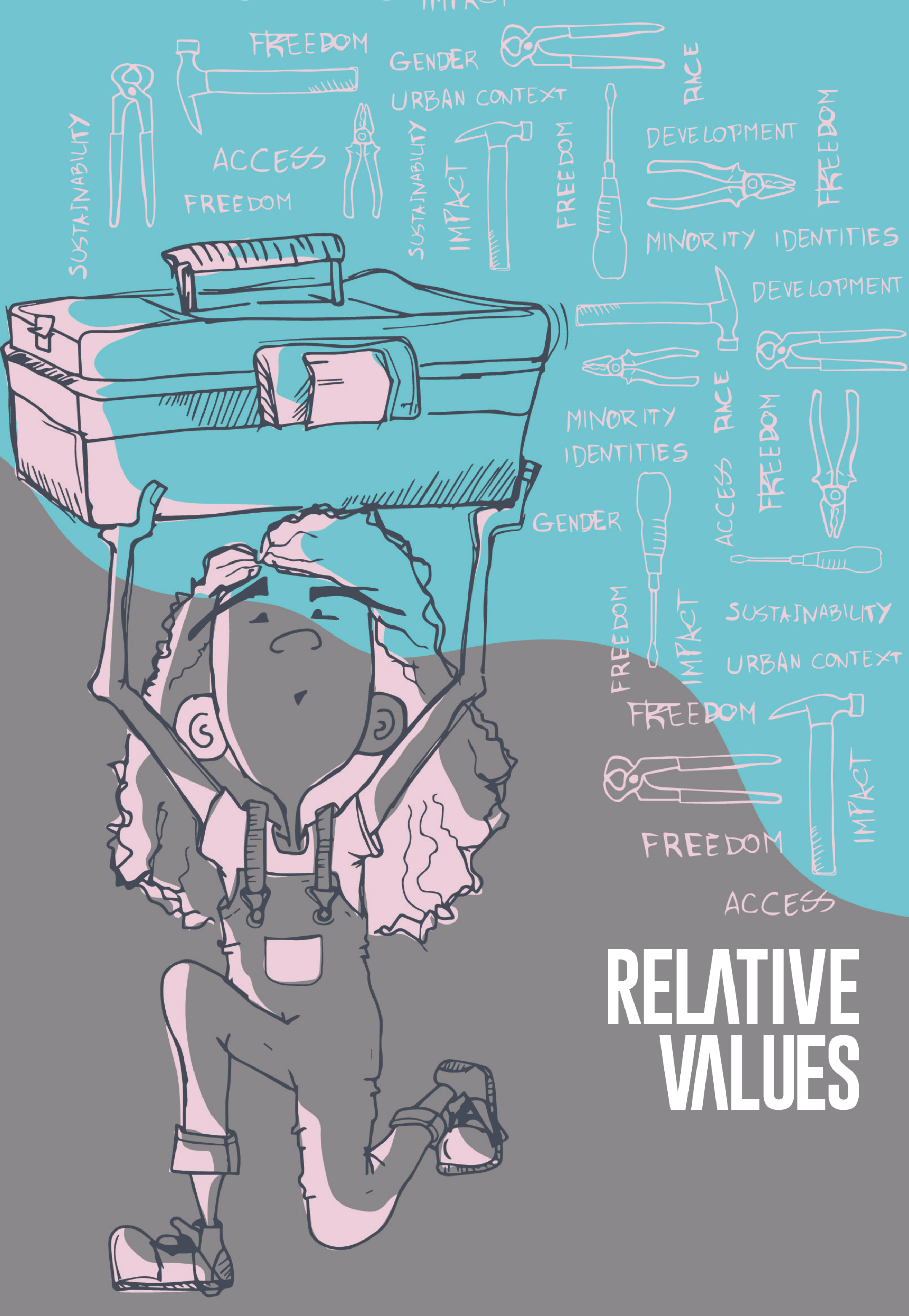
TOOLKIT



RELATIVE VALUES

The Relative Values Project

Principal Investigator: Paul Heritage
Co-Investigator: Leandro Valiati

Toolkit writing team: Poppy Spowage and Mariana Steffen

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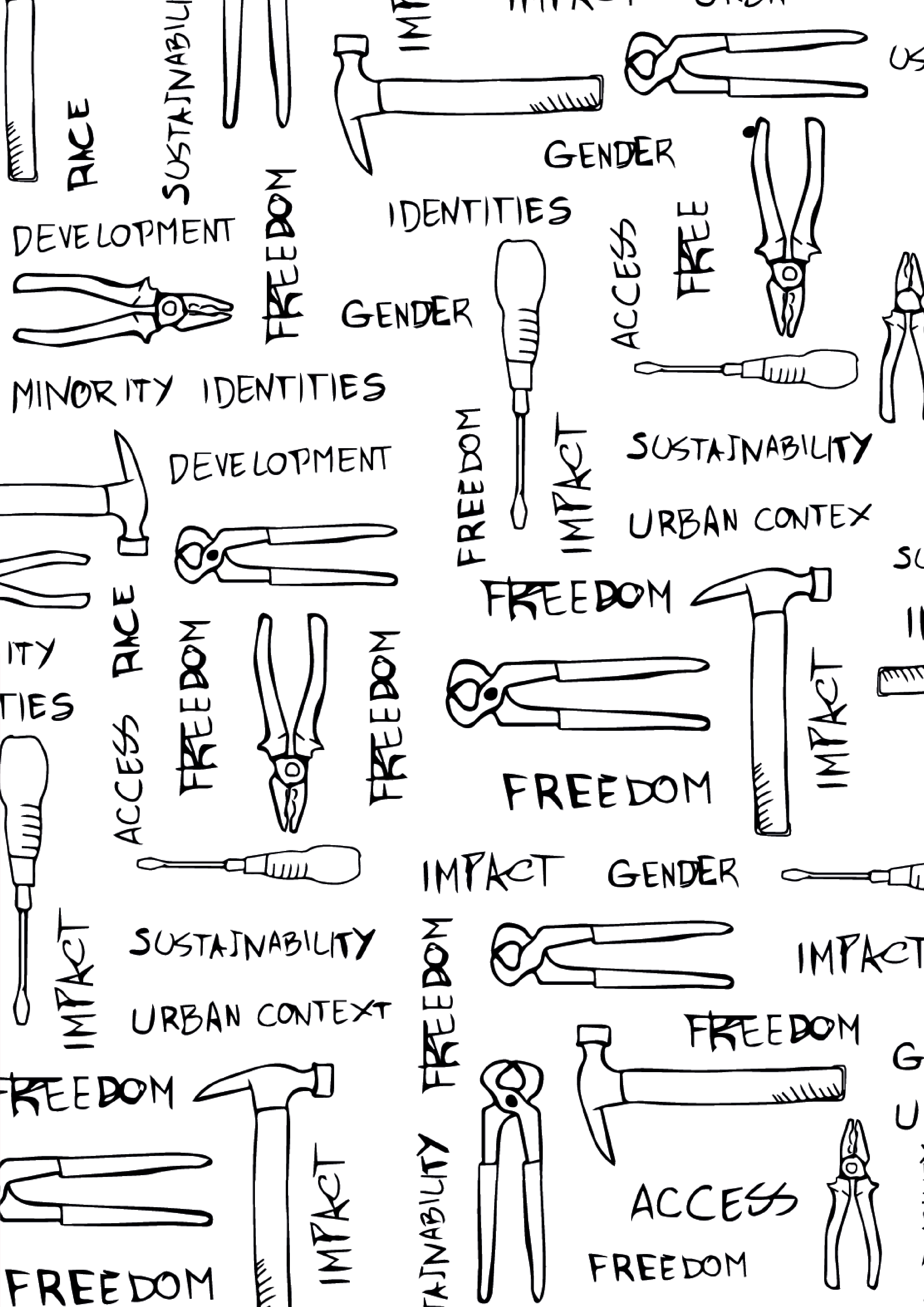
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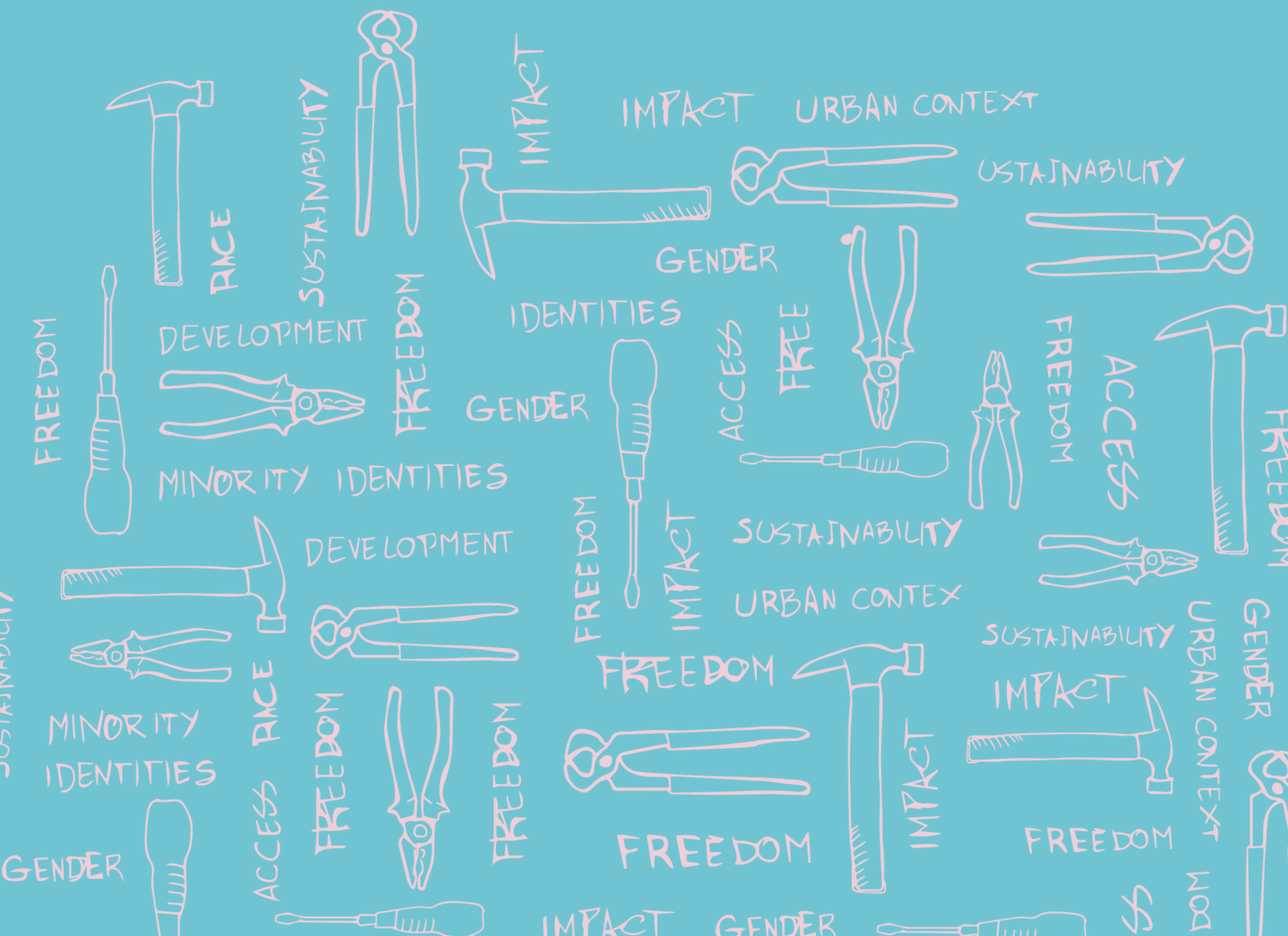
INTRODUCTION

Relative Values set out to construct a new narrative about the socioeconomic impacts generated by cultural activities, through co-creative research partnerships with arts organisations in Britain and Brazil. In collaboration, we developed methodology and multi-dimensional indicators so that creatives and cultural organisations can develop their research capacity, understanding and articulating the cultural value of their initiatives that seek to make real and transformational change within the contexts where they work.

We have created this toolkit to share our methodologies in an accessible format with other researchers and practitioners, enabling a broader range of artists, projects and creative organisations to produce and analyse data, and quantify elements of their impact. The ambition is that the data generated through this methodology, will support artists and organisations to understand the impact of their interventions, enabling them to refine activities and better articulate the value of their work with key institutions, policymakers and decision-makers supporting creative practice.

Apply this step-by-step toolkit to develop your own multi-dimensional indicators relevant to your practice and community, and collect and analyse data about the broader socio-economic impacts of your interventions. We hope this will enable you to better understand, refine and articulate the cultural value of your creative initiatives.



PHASE ONE

Mapping the Artistic Intervention and the Territory

Before developing your indicators, it is important to understand the nature of your artistic intervention and the specific socio-economic challenges facing your community.

Workshop 1: Which story do you want to tell about your organisation, project or activity?

Are you looking to better understand the impact and value of your organisations or a specific project or activity? Once this is clear, design and undertake a workshop with your team to explore the following questions:

- When you tell the story of the organisation/project/activity to someone new, how do you describe your work? What do you include?
- Telling the story helps to value the role of culture and the arts in people's lives. Ask yourself: what is the legacy of the organisation/project/activity in terms of memory and transformation?

We can tell stories with words, but sometimes numbers help bring clarity and objectivity, and can be particularly useful in discussion with policy makers and stakeholders supporting the work.

Define who you are looking to communicate your findings with. Is it one or more of the following:

- Community [for accountability of your work]
- General public [to better Market and advertisse your work]
- Local leadership, policy makers and stakeholders [improving dialogue]
- Funders [current funders and to attract new financial support]
- Yourself [to improve your own knowledge of the organisation/project/activity]

Output: A clear understanding of the story you want to tell with data and who you will communicate your findings with.

Workshop 2: Understanding the Nature of the artistic intervention and the Territory

Once this is clear to you, design and undertake a workshop with your team to explore the following questions and refine your understanding of the nature of the artistic intervention, with particular reference to the socio-economic challenges facing your community/artists/audiences/participants:

1. How was the organisation/project/activity created?
2. What is the main objective of the organisation/project/activity?
3. What specific actions do you have planned within the organisation/project/activity?
4. In which territory does the organisation/project/activity take place?
5. Is there a relationship between the organisation/project/activity and the territory in which it occurs? If so, how do you describe it?
6. What is the target audience of the organisation/project/activity?
7. What relationship does the organisation/project/activity establish with this audience?
8. What is the socio-economic profile of the organisation/project/activity's audience/participants?
9. How do you think the organisation/project/activity improves participants' lives?
10. Describe the creative process of the organisation/project/activity.
11. How does the organisation/project/activity introduce artists, producers and/or cultural agents to new people and new realities?
12. During the execution of the work, what types of partners in the territory does the organisation/project/activity approach and partner with?

Output: A clear understanding of the nature of your organisation/project activity and the territory/community that you're working with.

PHASE TWO

Understanding and Defining your Indicators.

Indicators are tools for measuring real life experiences and making them socially meaningful. They provide quantitative data, normally in the form of rates, proportions or absolute values, and can be useful in understanding complex social realities. You can create an indicator to answer many types of questions about the impact and value of work, and carry these out with your selected community via a survey. In order to provide meaningful data, indicators must be **SMART**:

- **Specific:** The indicator should accurately describe what is intended to be measured, and should not include multiple measurements in one indicator.
- **Measurable:** Regardless of who uses the indicator, consistent results should be obtained and tracked under the same conditions.
- **Attainable:** Collecting data for the indicator should be simple, straightforward, and cost-effective.
- **Relevant:** The indicator should be closely connected with each respective input, output or outcome.
- **Time-bound:** The indicator should include a specific time frame.

Taking the topic of 'Individual Agency' here are a few examples of indicators that previous participants have developed in our projects:

Topic	*Indicator*
Individual's capacity for agency	Reflexivity
	Social Capital Expansion
	Social Engagement
	Expansion of Perspective

Now it's your turn!

Workshop 3: Developing your Indicators and questions

Once you are clear on your topic, you can develop your own indicators and then questions in a workshop with your team, develop 10-12 indicators with accompanying questions that will help you tell your story to your audience.

A good place to start is by researching what public statistics you can access about your local area and its population from sites such as the National Office of Statistics; local council and health authority statistics; government publications on Indices of Deprivation, etc. What stories do policy bodies and authorities use these statistics to tell or evidence?

Once you have an idea of what is already out there in terms of data and statistics you can ask: what is missing and what we might build on or draw comparison with? Then you can start thinking about your own indicators.

The process for each indicator and set of questions that accompanies it is simple, for example:

1. What do you want to measure (eg. Agency of young people engaged by the organisation/project/activity)?
2. Defining what can be used to measure that action will help you arrive at the right questions (eg. What is 'agency' and what can we use to measure this?)
3. If you are unsure, ask yourself 'how does this action manifest in reality'? (eg. 'Agency' is demonstrated by reflexivity, young people who understand themselves and are comfortable with who they are).
4. Refining questions that will provide answers to that indicator (eg. The question might be: 'do you understand yourself better and/or are you comfortable with who you are after participating in the organisation/project/activity?').

Here are a few examples of questions that accompany the indicators that previous participants have developed in our projects:

Topic	Indicator	Question — Since participating in the organisation/project activity...
Individual's capacity for agency	Reflexive individual	I understand myself better and/or I am comfortable with who I am.
		I think more about the world and those around me.
		I think more often before I act.
		I put myself in other people's shoes more often.
	Social capital expansion	I got to know or became closer to people during the project
		I trust the people I have met through the project
		I would like to keep in touch with the people I met during the project
	Social engagement	The project encouraged me to take part in more social activity
		I have started to participate more in activities related to issues in my area
		I have reflected on or talked to other people about challenges in my area and possible solutions
		I have individually or with other people taken steps to solve problems present in my area
	Expansion of perspectives	I feel better prepared for my job or more able to get a job
		I feel more encouraged to continue with my education
		I think I have more options for my future

To check you're on the right track and test if your indicators are really **SMART**, complete the right hand column of the following table for each indicator:

Indicator name:	[It must be clear and objective]
Purpose:	[Briefly describe the purpose of this indicator, that is, what is measuring and what will it produce?]
Limits:	[Point out the limits of the indicator, for example, what does it not tell you?]
Calculation methodology:	[Explain the formula for calculating the data that the indicator produces]
Units of measure:	[What is the unit of measure? For example, is it days, %, minu-tes, currency, people, number of homicides etc.]
Process and questions:	[If collecting primary data, describe how the research will be carried out (what questions will you use), if secondary, indicate the source(s) you will use]
Geographical and territorial breakdown:	[Cite the geographical areas the indicator will cover, for exam-ple, is it a municipality, specific neighbourhood, etc. What are the territorial boundaries you are working with?]
Socio-demographic breakdown:	[Indicate the population groups you will apply the indicator to. For example: age, gender, ethnicity, social class, economic background etc.]
Data update frequency:	[Indicate how often the indicator is updated (daily, monthly, bi-monthly, quarterly, half-yearly, annual, ten-year, every five years, etc.)]
Interpretation parame-ters:	[Interpretation parameters refer to how the indicator should be interpreted and what the result might be compared to. For example, a certain percentage of young people demonstrating 'protagonism' might be difficult to determine as good or bad if there has been no previous research undertaken in this area. Determine how the indicator might be interpreted: if your data set is above 70% of young people demonstrated 'protagonism' – what does this reveal?]

Output: 10-12 indicators that are specific, measurable, attainable, relevant and timebound, with accompanying questions that you will secure answers to and assess via a survey.

PHASE THREE Research Design.

It is important that you understand how you will undertake the research. Design and undertake a workshop with your team to design your research process:

Workshop 4: Research Design

With your team you need to define the population you are surveying and how you will undertake the research. Firstly, focus on identifying the sample size:

How many people are you going to survey?

It is important that your sample has statistical power and it is possible to identify this through using an online sample calculator such as Raosoft: **http://www.raosoft.com/samplesize.html.** Simply fill out the four boxes and it will provide a recommendation. We recommend using the following calculations for anything that is unknown:

1) 5% for 'what margin of error can you accept?'.
2) 95% for 'what confidence level do you need?'.
3) 20,000 for 'what is the population size?' if this is unknown.
4) 50% for 'what is the response distribution?'.
5) Finally, we would recommend adding on an additional 10% to your survey sample (so if the calculation comes out at 250, then survey 275 people) to allow for removing any invalid responses you receive.

Then explore the following questions with your team:

- What are the socio-demographics of the target audience?
- How will we undertake the questionnaire: online using an application like Google Forms or Survey Monkey? With physical handouts? Via phone calls?
- How will you reach and engage your target audience? For example, will you undertake particular outreach activities such as a social media communication strategy, a specific event or after a performance/exhibition?
- Who will be responsible and undertake the survey? Your team? Representatives from your community?

Output: a clear understanding of the sample size for your survey and how you will undertake the survey with your community.

PHASE FOUR Survey Design.

As well as your indicators and questions, there are other important pieces of information to include on your survey. Design and undertake the following three workshops to develop a consent form, the socio-demographic information that it is important to include, as well as your survey questions.

Workshop 5: Creating your Consent Form

It is important that you understand how the data you gather will be used and stored. It is essential that you prepare a consent form, that is included at the beginning of the survey (online survey) or in a separate document (paper survey). The consent form should include the following information:

- Title of the study
- Main researchers, principal investigators and organisations involved

It should also include information for each participant completing the survey that includes the following:

1. What is the purpose of the study?
2. What does participation in the study entail?
3. What can be done if the participant decides to leave the study or withdraw their information? (Depending on how and when you anonymise the survey results, it may be possible to withdraw their response before analysis and publication of the anonymized statistical results, but not after that stage.)
4. What will you do to take care of the participant's privacy and your information?
5. What benefits might the participant receive from taking part and completing the survey?
6. What are the possible risks for the participant?
7. Will there be any sort of economic compensation for the participation in this study?
8. What can the participant do if they need more information about the study?

Finally, it should include a declaration of consent (for those +18 years) and/or assent (for those under 18 years).

Output: A bespoke consent form that will accompany and be completed before your survey.

Workshop 6: Designing your Survey (Socio-demographic Information)

It important that you include certain socio-demographic questions at the start of your survey in order to analyse your findings against. For example, 80% of young people (between the age of 18-30) participating in our creative work felt they expressed protagonism in their day-today lives. Here is a checklist of the types of socio-demographic information it might be important to consider:

1. Age
2. Gender identity
3. Sexual orientation
4. Ethnicity (country of birth / nationality / language spoken at home / geographical origin)
5. Religion
6. Education
7. Income
8. Economic activity
9. Place of living
10. Household information
11. Marital status

More information can be found here: **https://www.ons.gov.uk/methodology/classificationsandstandards**

In a workshop with your team, design your questions about socio-demographics to include at the beginning of your survey. Example questions include:

Socio-demographic question		
1. How old are you?	a.	17 or younger
	b.	18-30
	c.	31-40
	d.	41-50
	e.	51-60
	f.	61-70
	g.	70 or older
2. What is your gender?	a.	Female
	b.	Male
	c.	Gender fluid
	d.	Other: please specify
3. Do you consider yourself to be:	a.	Heterosexual or straight
	b.	Homosexual
	c.	Bisexual
	d.	Prefer not to answer
4. What is your ethnic group?	a.	White
	b.	Mixed/Multiple ethnic groups
	c.	Asian/Asian British
	d.	Black/African/Caribbean/Black British
	e.	Other ethnic group. Please specify
5. What is your religion?	a.	No religion
	b.	Christian (including Church of England, Catholic, Protestant and all other Christian denominations)Buddhist
	c.	Hindu
	d.	Jewish
	e.	Muslim
	f.	Sikh
	g.	Other. Please specify:
6. What is your highest level of education completed?	a.	No formal education
	b.	Primary education or less
	c.	Secondary education
	d.	Higher/technical education
	e.	Other. Please specify:

Socio-demographic question		
7. How much total combined money did all members of your household earn in 2010?		
8. Which of the following options best describe your current main occupation?	a.	I work
	b.	I am a student
	c.	I am a housewife / house husband
	d.	Other – please specify
9. What is your postcode? (or where do you live: borough/ci-ty/etc)		
10. Who do you live with in your household?	a.	I live alone
	b.	Parent(s)
	c.	Sibling(s)
	d.	Partner/spouse
	e.	Child/children
	f.	Other – please specify:
11. How many people live in your household, including you?		
12. What is your marital status?	a.	Single / unmarried
	b.	Married
	c.	Co-habiting
	d.	Separated
	e.	Divorced
	f.	Widow / widower

Output: A series of bespoke questions ascertaining to sociodemographic information that will be included at the start of your questionnaire/survey.

Workshop 7: Designing your Survey (Types of Questions to Ascertain Impact)

Finally, in your survey it is important that you ask the questions in the right format in order to get the information that you need. There are lots of different types of questions that you can ask. In this workshop with your team reflect on your indicators and design the appropriate type of questions, here are some examples of different question types:

Scale questions: these aim to ask a participant's specific view on a matter, such as their level of agreement or disagreement with a specific topic / statement. 'Likert-type' scales are the most popular option and will probably apply to most of your questions, with 5 to 7 options to select from, and the middle one considered 'neutral'.

An example:

Score from 1 to 5 the following statements:
(1 = completely disagree, 2 = disagree, 3 = neither agree nor disagree, 4 = agree e 5 = completely agree)

It is important that everyone can engage with arts, cultural and creative activities.
1 2 3 4 5 N/A
Art is part of my life. 1 2 3 4 5 N/A

Rank questions: are used to rate items on a scale or in order of importance. For instance, a list of categories or topics is presented, and participants are asked to rank them considering a pre-determined scale, e.g. from 1 to 5, 1 being the most important and 5 the least.

An example:

Please rank the following activities according to their importance in your daily routine, from 1 – most import to 5 – least important.
__ Reading a book
__ Going for a walk
__ Using social media
__ Listen to music
__ Meditate

Binary questions: these are usually 'Yes' or 'No' questions. Options such as 'Maybe' or 'Do not apply' can be added, however these are discouraged as they might jeopardize quality of the data.

An example:

Have you ever been paid from working on a cultural, creative or artistic activity?
( ) No.
( ) Yes.

Multiple choice (single answer) questions: these aim to get one answer from respondent.

An ‘Other’ option can be offered, asking for specification of why they selected that option, and should come with an instruction ‘Please select one option only’

An example:

How do you go to the organisation’s venue?
(please choose only one option)
( ) On foot.
( ) Public transport (bus, underground, train).
( ) Bicycle.
( ) Car.
( ) Motorcycle.
( ) Other. Which?

Multiple choice (multiple answer) questions: these allow participants to choose more than one option (meaning one option doesn’t exclude the other). An ‘Other’ option can be offered, for specification of why they selected that option, and should come with an instruction ‘Please select all that apply’

An example:

After taking part in the project, you:
(please select all that apply)
( ) Have been sharing ideas with other people.
( ) Have been inspired to learn about new things.
( ) Felt more comfortable to make mistakes during a creative process.
( ) Felt able to create original work.
( ) Thought about possible solutions to problems in your daily life.

Open-ended questions: seek additional comment or personal details such as an email address or information that has not been covered by other questions. Such questions can ask for single or multiple-lines responses, depending on the answer expected. Length can be adjusted according to each survey platform and might help respondents in measuring the scale of their responses. Bear in mind that such questions will need ad hoc categorization which entails post-collection efforts.

What cultural, artistic or creative activities do you know about in your area?
____
____

If you still have any questions about this, here is a helpful guide: **https://www.culturehive.co.uk/resources/a-guide-to-the-types-of-questions-used-in-quantitative-questionnaires/**

Output: A series of bespoke questions ascertaining to the socio-economic and impact indicators you have developed, which will complete your questionnaire/survey.

PHASE FIVE

Data Collection.

Now you know how the research will be undertaken and have designed the survey it's time to collect your data! Here is a step-by-step guide for collecting and storing data in both a paper and online format, to help you make a clear plan and brief the members of your team undertaking the data collection:

Paper Surveys:

Undertaking a paper survey:

It is important that you understand how the data you gather will be used and stored. It is essential that you prepare a consent form, that is included at the beginning of the survey (online survey) or in a separate document (paper survey). The consent form should include the following information:

1. Before the survey is filled in, make sure that the Consent Form (or Assent Form for minors) is presented.
2. People who will respond should have received or be informed about the following information:
   - Why they were invited to participate in the research, reinforcing the link between the participant and the project that took him there;
   - What is the objective of the research;
   - It is possible to stop participating in the research if they wish to at any point;
   - That shared data will be kept anonymous.
3. The person must read and sign the Consent Form, if they agree with it. ***Reminder: the signature does not remove the anonymity of the questionnaire*.** The respondent's name and signature will not be associated with his/her questionnaire. You will demonstrate this by storing both documents separately.
4. It is important to keep the Consent Form and the survey in separate places, preferably a folder or a plastic bag.
5. The survey should only receive the survey to complete, after the consent form has been completed and stored.

Storing data from a paper questionnaire:

- Control of the survey: On the cover of each survey, write the survey number, for organisational purposes. Suggestion: insert, in pen, the initials of the person who undertook the data collection from your team, next to the survey number.
- Once the surveys are numbered and initialled, scan the questionnaires and consent forms, and store them on separate devises. Consent forms and surveys should be stored according to your organisations data protection obligations (check your countries legislation on this matter).
- Store the consent forms and surveys in separate, dry and sheltered spaces (remembering that blurred or ineligible questionnaires are lost data).

Online Questionnaires:

Undertaking an online survey:

- Set up the survey on the desired platform (ie. survey monkey or google forms). This should include your consent form at the beginning of the survey, socio-demographic information and finally your indicator questions.
- **You do not need a separate consent form.** But information from the consent form checklist must be present in the first screen of the online questionnaire.
- Send a link to the questionnaire via e-mail, WhatsApp or Facebook (depending on the research design), reinforcing the time limit that the person has to complete and submit their answers.
- **Suggestion:** set a deadline of 2 weeks before you need their responses. This will give you time to chase responders and search for other participants if the response rate was not high enough/extend the deadline by another week.

Storing data from an online survey:

- Data will be automatically saved in the chosen digital platform hosting the survey (ex.: Survey Monkey, Google Forms).
- The digital platform will systematise the data in an excel spreadsheet, which you should download.
- Surveys should be stored according to your organisations data protection obligations (check your countries legislation on this matter).

PHASE SIX

Data Analysis.

For this stage you might want to work with someone with experience of treating and analysing data – if that is not possible, you can do it yourself in the three simple stages outlined below:

Step One: Treating the Data

At this stage you need to go through all of the surveys and check that they are valid. You should be looking out for two things:

1. Does each response fit the socio-demographic criteria outlined in the research design? For example, if in your research design you decide to focus on surveying participants of an organisation/project/activities in a particular age bracket - say 18-25 - then you need to remove any surveys completed by someone who is not a participant, or is outside this age bracket.
2. It is simpler for your analysis to discount any questionnaire where not all answers were completed. At this stage go through each questionnaire and remove any that have missing answers.

The additional 10% added to the sample size in research design, should allow for the questionnaires you need to discredit without affecting the validity of your sample size.

Step Two: Uploading and playing with the data

There are various programmes you can use to analyse the data, but Microsoft Excel is the simplest and most accessible format. Once your data is uploaded into a table we recommend you using the pivot table option, which will allow you to disaggregate data in different ways, for example by specific socio-demographic information.

If you are not familiar with pivot tables, we recommend undertaking a short online course. There are a number of free and low cost options available on Udemy that can be accessed here: https://www.udemy.com/topic/pivot-tables/free/

Step Three: Analysing the data

What does this information tell you? It is at this point that you may want to return to the public statistics you had researched when developing your questions and indicators. What does your data reveal – what stories does it tell - in comparison to other available statistics? What does your survey reveal that might not have been demonstrated by data before?

PHASE SEVEN

Presenting your Data.

Now for the fun part: telling your story to your audiences! Here are a few final tips for presenting and sharing your data:

- Remember who the audience is as this might change how you present the data and what information you share. For example, policymakers will probably benefit from hearing different things to your community. This might mean you present your data in different ways for different people...
- We recommend a short introduction to your research design and process: what did you do, how did you do it and why? This can just be a few sentences.
- Keep it short and focused! Your desired audience doesn't need to know all your findings – what are the key findings? What stories do you need to tell? How are you going to tell them? Tip: findings are often easier to interpret from simple graphs and infographics.
- What does your analysis provide evidence of and why is it important? Again, this might just be a few sentences, but should get to the heart of what you were trying to achieve and why it's important.
- Finish by looking forward: how do your results influence your work going forward, and how might they impact your audience?

We look forward to hearing how you got on...

Send us an e-mail at

relativevalues@peoplespalace.org.uk

Good luck!

The Relative Values Team

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