CULTURE AND WELLBEING
THEORY, METHODOLOGY AND OTHER CHALLENGES: AN ITINERARY

by Culture Action Europe

1. FOREWORD

This project aims at assessing the impact of culture on well-being, starting from the direct experience of cultural operators and organizations and from their public. As already possible with sustainability reports, cultural organizations should be able to become accountable for their contribution to the well-being of both their own operators and their audiences.

That experience should also be connected to the vast international effort to develop theories on the relationship between culture and wellbeing and appropriate methodologies to assess it in quantitative and qualitative terms alike.

2. A THEORETICAL FRAME OF REFERENCE

2.1. Definitions

An <u>impact</u> is defined as a permanent and relevant change that occurs in a place, an ecosystem, a group or an individual as a result of the encounter with an agent (generally referred to as impactor).

<u>Social impact</u> is the result of the encounter with social forces, and its extent depends on the strength of the source of impact, the immediacy of the event, and the number of sources exerting the impact. To put it simply, in the original theory, social impact as a phenomenon in which people affect one another in social situations[1].

Culture is indeed a *social force*, and its social impacts deserve a special attention.

While the notion of impact has mainly negative connotations in some fields, like in environmental studies, the concept of social impact is neutral, and can be applied to both desirable and undesirable changes.

<u>Assessment</u> is defined as a process by which a social phenomenon is documented, measured and evaluated, through quantitative or qualitative methods, generally to the purpose of orienting future action or policies.

In the first months of 2015, a group of international organizations working for the inclusion of culture in the post 2015 Development agenda, have published a proposition paper where, among other things, they state:

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[1] Latané, B. (1981). The psychology of social impact. American Psychologist, 36, 343-356.

"During the last decade the international community has collected substantial evidence on the role of culture in development. The conclusion is that, most often, development policies and projects which do not take into account the cultural dimension have failed. Culture effectively contributes to policies, strategies and programs targeting inclusive social and economic development, environmental sustainability, harmony, peace and security. Culture is both a driver and an enabler of sustainable development."[2]

Culture is defined by Unesco as "that complex whole which includes knowledge, beliefs, arts, morals, laws, customs, and any other capabilities and habits acquired by [a human] as a member of society". But, since that definition leads to the conclusion that all human activities and their products are *per se* a piece of culture, we would risk investigating the social impact of any possible human activity. A further refinement of the concept is therefore necessary for the present project.

The most recent effort to define statistically culture has been produced by an European Statistical System Net (ESSnet Culture) in 2012[3]. Together with cultural expenditure, it describes

- the cultural sector of activity (cultural industries and cultural employment), including 10 cultural domains: *Heritage, Archives, Libraries, Book and Press, Visuals Arts, Performing Arts, Audiovisual and Multimedia, Architecture, Advertising and Arts crafts* and 6 functions: *Creation, Production/Publishing,*

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[2] IFACCA, Agenda 21 for culture, IFCCD, Culture Action Europe, International Music Council; Arterial Network, International Council on Monuments and Sites, International Federation of Library Associations and Institutions, Red Latinoamericana de Arte para la Transformación Social.
[3] http://ec.europa.eu/culture/library/reports/ess-net-report_en.pdf

Dissemination/Trade,   Preservation,   Education   and Management/Regulation and

- Cultural participation and practices, comprising. *amateur practices*, i.e. practicing the arts leisure; *attending/receiving*, i.e. visits to cultural events and following artistic and cultural broadcasts of all kind of media and social *participation/volunteering*, i.e. being a member of a cultural group and association, doing voluntary work for a cultural institution etc.

In the present exercise, we propose to investigate the social impact of actions occurring either in the context of the cultural sector and of cultural participation and practice.

2.2.   Literature and resources

A rich multidisciplinary literature is available to date for those who venture in the field of culture's social impacts. Studies and reports have been promoted by governments, research institutions, cultural and artists' associations, health and social care organizations, and citizens' groups of various nature. Consequently, they differ a lot in scope, purpose, paradigms, field of application, reliability, academic, theoretical and methodological refinement, neutrality, and even in the very notion of culture they have put at their roots. For this project, we have selected about 200 pieces of literature: books, handbooks, papers, presentations, questionnaires, websites, forums and other web resources. We have consulted at least three times as many. With the due consideration of their heterogeneous origin, we have grounded our motivated choice on the *qualitative* contribution each of them offered to our reflection: a well-defined concept, new data, a good question, an interesting method for gathering information, a brilliant approach, a

useful idea or a provocative image, and so on. The process of selection has been carried out since April, 2014, and has been characterized by an open method, based upon wide participation and sharing.

The Annex offers a first annotated list of references. As the project is in progress, the documents are open to continuous revision and additions.

This section proposes a brief synthesis of what the vast material thus gathered has revealed to us, built around three axes:

a) the *cultural* place assigned to culture,

b) the growing need for formal legitimation and accountability of resources invested in culture and

c) the specific contribution of culture to the wider efforts to measure such complex (and in some perspectives, unmeasurable) phenomena as value, sustainable development and wellbeing).

The three axes are not mutually excluding, and, in some cases, overlap or mix each other. For each axis, we provide a few examples.

2.2.1. The cultural place of culture in the European context

Every society gives, through a *cultural* process, a specific place and rank to *culture*. Ironically enough, one of the reasons of the increasing demand for measures of economic and social impacts of culture is to be found in the loss of social perception of its intrinsic value.

In the past, the complex object that today we call culture ranked high: the archaic Indo-European social hierarchy tended to include the top intellectual-creative skills among the attributes of the highest caste, and to tribute honours and privileges to the finest artists. From built heritage to theatre, from poetry and literature to participation in traditional rites or the wearing of a traditional costume, the reason for the very

existence of culture (or better, of its contents, when the name by which it goes now had probably not been invented yet [4]) has gone unquestioned for a very long time in history.

During the Communal age, the Constitution of Siena, in 1309, stated the need for city decoration and embellishment as a duty of hospitality in favour of the foreigners who came and who were entitled to be received in a beautiful environment: the government, they wrote, "must cherish the beauty of the city, for the enjoyment and merriment of the foreigners and the honour, prosperity and growth of the city and its citizens[5]".

Majesty and power – especially in their absolutistic or authoritarian versions - have always spoken fluently the language of the arts, and so have done the revolutionary forces who opposed them.

The so called High Brow culture was for centuries a distinctive status symbol, and literature, music, painting and other fine arts were a basic part of the education in the upper classes (the Grand Tour to Italy and Greece provided a field refinement in the classical culture for some very wealthy youngsters), but they were appreciated, recognized and sought also by the lower classes, together with what came to be called *folk arts*.

The same held true even in times of emergency. During the World war II, the Anglo American allies created the Monument Men military unit for

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[4] Cicero is one of the first recorded sources of the word culture. In his Tusculanae Dusputationes (45 b.C.), he states, with an agricultural metaphor, that "*cultura animi philosophia est*": philosophy is the cultivation of the soul. Much later, in 1623, Francis Bacon wrote about "doctrina de cultura animi" (De dignitate et augmentis scientiarum) and Immanuel Kant, in 1781, about the *culture of reason* (Kritik der reinen Vernunft). Voltaire's view is very close to the current one: "As a result of this presentation of the subject, it is clear that everything which belongs intimately to human nature is the same from one end of the Universe to the other; that everything that depends on custom is different, and it is accidental if it remains the same. The empire of custom is much more vast than that of nature' it extends over manners and all usages, it sheds variety on the scene of the universe; nature sheds unity there; she establishes everywhere a small number of invariable principles. Thus the basis is everywhere the same, and culture produces diverse fruits." *Essai sur les moeurs*, ch. CXCVII, Oeuvres, vol. XVIII, p. 425.

[5] *deve avere a cuore "massimamente la bellezza della città, per cagione di diletto e allegrezza ai forestieri, per onore, prosperità e accrescimento della città e dei cittadini.* Costituto Senese, 1309.

protecting the cultural heritage endangered in areas of conflict[6]. They actually spent big amounts of money and resources to safeguard the existence of arts objects and beautiful buildings of the past.

Religious arts and architecture in Europe flourished in the past centuries and, even in the XX century, Le Corbusier or Luigi Nervi, Oscar Niemeyer or Ninian Comper, to name a few, contributed to it. Urban art and architecture have for a long time expressed universally understood values.

The need for "roses", together with "bread", is another way to put it.

Culture enjoyed for a very long time an unquestioned high rank on the scale of social values: it was a natural necessity, and the question of its usefulness was simply out of question.

For complex reasons that go beyond the scope of the present exercise, but are probably connected with the birth and development of the *cultural industry*, as analysed by Horkheimer and Adorno as early as 1944, the question, however, has indeed arisen. Coupled with a declining consensus on his necessity, culture has increasingly been perceived by a growing number of politicians and decision makers in its *instrumental* dimension, and its existence has increasingly been justified on the basis of its proved usefulness. This has of course undermined the automatic legitimacy of relevant investments in the sector, unless economic returns could be expected (best if in the short term). In those countries where the bulk of financial resources for culture is public, scarcity, spending review, economic crisis, combined with the lowering of the social appreciation of culture, have dealt an heavy blow on the sector,

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[6] Annalisa Cicerchia, Le proprietà culturali in tempo di guerra e sotto il fuoco amico, in "Economia della Cultura" 3/2012, pp. 253-262, doi: 10.1446/38895

but the same can be said of those countries where culture derive its main resources from private support.

Initially welcomed as a deserved acknowledgement of the collateral merits of culture, the relevance of social and economic benefits it is expected to generate has progressively outgrown and replaced its *intrinsic* value. The time has come, apparently, for culture to start afresh and *earn a living*.

2.2.2. Legitimation and accountability

"....The third and last duty of the sovereign or commonwealth is that of erecting and maintaining those public institutions and public works which, though they may be in highest degree advantageous to a great society, are, however, of such a nature that the profit could never repay the expense to any individual or small number of individuals". With these words, Adam Smith, speaking of government spending, explains the notion of *merit good* (The Wealth of Nations, 1776).

A merit good is "a good (or service) which some "outside analyst" considers to be intrinsically desirable, uplifting or socially valuable for other people to consume, independently of the actual desires or preferences of the consumer himself. In the case of such goods, it is sometimes held that free consumer choice is inappropriate, and therefore that if many consumers left to themselves are unwilling to purchase "appropriate" quantities of such goods, they should be encouraged or even compelled to consume them anyway. Such arguments are often employed in an effort to justify government intervention in the market place to provide such alleged merit goods to the citizenry, either through direct government provision of the good at no cost to the consumer or through payment of tax-financed

government subsidies that enable private providers to sell the good far below its true costs of production. Typical examples of alleged merit goods might include various forms of "higher culture" often ignored by "lowbrows" (grand opera and ballet performances, museums, ... etc."[7]

Together with education and health services, culture is a classic example of merit good. Public support, regulation and subsides are grounded on this quality, i.e. on the appreciation of its intrinsic value by the authorities.

In addition, culture has an <u>existence value</u>. Once an arts or cultural product is created, people place a positive value on its very existence, over and above its commercial value. For example, a person may perceive a symphony orchestra or an architectural masterpiece to have a positive existence value even though they may not wish to attend a performance or visit the building[8]. Another non-user value is the <u>legacy value:</u> the perceived existence value of a cultural object (a statue, a film, a book, a music, etc.) extends over time, and it is deemed to be worth handing down to the future generations.

But again, merit, existence and legacy, all depend on the appreciation that any given society attaches to culture. When that appreciation is low, the very foundation of the concepts of merit, existence and legacy value are at risk.

If culture is no longer justified per se, the entire sector suffers from a legitimacy crisis, and its existence theoretically and politically requires to be supported by a robust evidence of the benefits it generates. In other words, its perceived value resides outside itself.

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[7] P.M.Johnson, "Merit good". *A glossary of political economy terms*, http://www.auburn.edu/~johnspm/gloss/merit_good. Accessed February 2d, 2015.
[8] http://www.arts.vic.gov.au/files/c0eb6e55-cb0d-4fc7-b31e-9b6700de132a/Role_of_ArtsnCulture_in_Liveability-submission-precis.pdf.

Accountability is therefore the next question to address. A delicate question, because in the last 25 years, while its intrinsic value was progressively shrinking in the collective imagination, culture has been the object of great expectations because of its instrumental value.

During the 1990s, in Europe, potential culture-based job and business creation were a common topic of debate. This is one of the reasons why the greatest source of EU funding for culture, starting in 1994-1999, have in fact been the Structural Funds, i.e. the funding tool of the Union's economic cohesion policy[9]. Their rate of contribution to the EU expenditure for culture reached at a certain point 83%, against 7.7% from the sectorial programmes ("Culture", "Media", etc.). "There would not have been a Creative Estonia policy programme, a Quartier de la Création (Nantes), a revitalised Temple Bar quarter (Dublin) or a Prototype Fund for video games (Dundee) without EU regional funding. Nantes Métropole has spent 18% of its ERDF budget (around € 54 million) on projects related to urban renovation and attractiveness, including the creation of cultural facilities. Even Berlin has devoted € 50 million to culture and CIs. These are important amounts, especially if compared with the €400 million total budget of the European Culture Programme." [10].

Nonetheless, in the document of the Lisbon strategy, aimed at making the EU "the most competitive and dynamic knowledge-based economy in the world capable of sustainable economic growth with more and better jobs and greater social cohesion", by 2010, the noun culture appeared

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[9] For further details, see: http://www.keanet.eu/docs/structuralfundsstudy.pdf and
http://www.eenc.info/wp-content/uploads/2011/07/pl-sacco_culture-3-0_CCIs-Local-and-Regional-Development_final.pdf
[10] http://www.europarl.europa.eu/RegData/etudes/etudes/join/2012/474563/IPOL-CULT_ET%282012%29474563%28SUM01%29_EN.pdf

only twice, and never in the sense we are using here, but as "entrepreneurial culture" and "technological culture".

Data were scarce, though, measures scarcer and their need begun to be felt, even in those countries and in those milieux that at the time were not adequately equipped. Built on the Unesco structure, Eurostat published its statistical framework for culture in 2000 (revised by a special ESSnet in 2012).

In 2006, the EC released a Report on the Economy of Culture in Europe [11], based on 2003 (and earlier) data and a quite inclusive definition of the sector. Probably a delusion for those who were expecting big numbers, the Report documented that culture and creativity are not labour-intensive industries (at their pre-crisis best, they reached 3.1% of the entire European labour force), and that they contributed to the GDP of the Union by the 2.6%.

Note that, after 2006, *culture* is being gradually integrated and finally replaced in the collective expectations about development, growth and wealth by *creativity*[12].

In December, 2014, a new report[13] was released by EY. The 2012 data it contains are heartening: with revenues of €535.9b, the creative and cultural industries (CCIs) contribute to 4.2% of Europe's GDP. The sector is its third-largest employer, after construction and food and beverage service activities, such as bars and restaurants. Employment tends to retain the same percentage (3.1%). One should however consider that both EU GDP and employment have consistently changed between 2003 and 2012: in absolute terms, 2003's 2.6% was equivalent to €654b, and

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[11] http://ec.europa.eu/culture/library/studies/cultural-economy_en.pdf
[12] See Florida, R. (2002). The Rise of the Creative Class: And How it's transforming work, leisure, community and everyday life. New York: Perseus Book Group and http://www.creativitycultureeducation.org/creative-industries-mapping-document-1998;
[13] http://www.creatingeurope.eu/en/wp-content/uploads/2014/11/study-full-en.pdf

the people employed was 5.8 million, against 7 million estimated for 2012.

Observatories have been created and data collection has slightly increased, with special emphasis on cultural economics. Two Eurobarometers (in 2007 and 2013[14]) have been devoted to cultural participation, but, being based on a sample of about 1,000 citizens per Member State, scholars tend to question their reliability.

On the whole, there is a neat discrepancy between whatever expectations politicians have on the *instrumental* value of culture and the actual available data to assess such value. This holds true at both macro and micro, EU and the local level.

Cultural-creative industries apart, the question remains how to assess the impact of culture. Documentation on the ex post evaluation of cultural projects in the Structural funds is unfortunately not detailed and comparable enough, brilliant cases like Temple Bar in Dublin notwithstanding.

The Kea report on culture in the Structural funds underlines that culture "can be mined to attain different policy objectives:

· improve social cohesion;

· increase knowledge;

· protect and promote heritage;

· develop the local economy."

In particular, the study of selected cases shows a coherent set of impacts, such as:

· development of creative entrepreneurship and talents (Tartu Centre for CIs, the video games Prototype Fund in Dundee, VC Fund in Berlin, Nantes and its performing arts scene);

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[14] http://ec.europa.eu/public_opinion/archives/ebs/ebs_399_en.pdf

· incubation of innovation and new business models (CIs Development Programme in Finland);

· encouragement of spill over effects between culture-based creativity and other sectors (ICT, manufacturing, tourism, etc.) (the Kunstgreb project on artistic interventions in Denmark, BUDA Fabric in Kortrijk);

· revitalisation of cities' quarters and image (Quartier de la Création Nantes, Klarendal quarter in Arnhem, Temple Bar in Dublin).

More on the cultural policy side, the European Capitals of Culture (ECoC) projects have been regularly analysed, also thanks to the methodological efforts carried out under the «Impacts 08 project»[15]. The method investigates the social, cultural and economic impacts of the ECoC experience on the city, and its legacy, in terms of sustainability of the cultural activities, infrastructures and governance. The process is made easier by the very structure of the ECoC projects, where desired impacts are clearly stated with target indicators, in a proper strategic planning framework, where specific and operational objectives are made explicit from the beginning.

This introduces an important aspect of accountability: it is much easier when evaluation (criteria, targets, parameters, indicators) is built in any project since the early stage of their planning. Ex post evaluation requires an ex ante frame of reference: when that frame is missing, assessment becomes much harder and its results are likely to be less reliable and relevant.

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[15] http://www.liv.ac.uk/impacts08/. See, for a recent report, http://www.mp2013.fr/wp-content/uploads/2014/12/ECoC-2013-final-evaluation-report.pdf

2.2.3. Sustainable development, Well-being and other complex measures, or the Other Reason

The social construction of value is a crucial theme when culture is involved. The most interesting and collective effort to research in that direction is «Cultural Value Project» by the Arts and Humanities Research Council, UK[16]. In their own terms, "the AHRC wishes to make a major contribution to how we think about the value of arts and culture to individuals and to society. Recent years have seen many attempts to capture that value in straightforward ways, not least in order to make the case to governments for public funding, but none have commanded widespread confidence."

Launched in 2012, and coordinating now about 70 separate projects, CVP investigates the components of cultural value, analysing the most recurrent benefits of culture in the international literature: "The benefits of cultural experience have been associated with a number of areas: economic benefits (not just economic impact which has in recent years been a dominant argument, but also the creative industries, cultural vibrancy as an influence on UK inward investment, and the argument that a vibrant arts and cultural environment has consequences for innovation across the economy more broadly); health, medicine and well-being; urban regeneration and community cohesion; cultural diplomacy – to mention just some." But, above all, CVP focuses on "the role of cultural activity in helping to shape reflective and engaged members of society. It focuses on the benefits of: an enhanced reflectiveness; an improved appreciation of the other and an understanding of oneself; a

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[16] http://www.ahrc.ac.uk/Funded-Research/Funded-themes-and-programmes/Cultural-Value-Project/Pages/default.aspx

sense of the diversity of human experience and values; an ability to reflect on difficult aspects of one's own life and that of others."[17]

CVP's approach leads us to a possible place where intrinsic and instrumental values of culture can be reconciled.

It is not the only one. The same can be said for the international efforts to investigate *cultural sustainability*, i.e. to add culture as the fourth, indispensable pillar[18], to environment, society and economy as the constituents of sustainable development. A good example of such an endeavour is the COST Action[19] IS1007: "Due to its broad definition and understanding "culture" can be regarded as a fundamental issue, even a precondition to be met on the path towards Sustainable Development (SD) that is necessary to get to grips with in our various European societies. Yet the theoretical and conceptual understanding of culture within the general frames of sustainability remains vague. Consequently, the role of culture in the political framework of sustainable development is poorly operationalised. Therefore, the ultimate goal of this proposed COST-Action is to increase understanding of and determine the role of culture in SD based on multidisciplinary principles."[20]. 25 countries take part in the project, which is carried out by investigating and operationalizing the concept of culture in the context of SD through multidisciplinary approaches and analyses; by examining the best practices for bringing culture into policy and practical domains, and by developing means and indicators for assessing the impacts of culture on SD. The results of the Actions will be exploited by the scientific

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[17] http://www.ahrc.ac.uk/Funded-Research/Funded-themes-and-programmes/Cultural-Value-Project/Documents/Cultural_Value_Project.pdf
[18] Among which the most relevant is "Agenda 21 for Culture – UCLG Culture Committee"
[19] Cooperation in Science and Technology.
[20] http://www.cost.eu/COST_Actions/isch/Actions/IS1007

community, policy makers, administrative personnel and practitioners working with sustainability and culture from the EU to the local level.

Another valuable opportunity to re-consider the intrinsic value of culture is represented by the «international research on well-being measurement».

The need to go beyond GDP as index of development has been evident among a minority of international distinguished scholars and policy makers for over 50 years. The last four years have seed renewed momentum of the issue, that is gaining consensus, also thanks to such relevant stirrups as the Stiglitz-Sen-Fitoussi Report and OECD's Better Life Index initiative. Measuring well-being – however – is by no means easier than measuring development. It implies, first, identifying its basic building blocks, i.e. describing phenomena that act as symptoms of wellbeing, and are necessary and sufficient, taken all together, to represent it.

If culture needs assessing and communicating its social impacts, the measures of wellbeing need culture for being reliable, sustainable and sound.

So far, the only example of formal inclusion of culture in a project of measurement of well-being is due to the initiative of Enrico Giovannini, then President of the Italian Statistical Institute. Cultural participation (expressed by a synthetic index) and cultural heritage and landscape have been considered among the over 100 detailed indicators that describe well-being in the BES (Benessere equo e sostenibile) project[21].

2.2.4. The lesson learned

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[21] http://www.istat.it/en/archive/84498.

Let us suppose that the cultural process we have been and are witnessing – the shifting place of culture in our societies – is a circular one and that we are approaching the closing of the circle. The intrinsic value of culture, and consequently the consensus surrounding it, have progressively weakened, to be replaced by an instrumental perception of the value of culture, that depends on its economic impact: income, jobs, business, turnover. In the meanwhile, a widespread social indifference or even contempt for intellectuals and artists, and a neat decline in the overall rate of participation/consumption in areas like book reading, theatre, concerts, museums and arts galleries, etc. has arisen.

But then, probably prompted by the delusion for the negative performances of the economy, the need for creativity, imagination, critical intelligence, even negative thought, unconventional points of view, newly found ties with traditions, beauty, harmony, knowledge, deep-reaching communication, empowerment, is creating a new place for culture, not only in our future, but also in our present.

We are challenged to represent and to communicate that need.

3. MEASURING THE SOCIAL IMPACT OF CULTURE: INPUTS FROM CAE LABS 2014

About 30 cultural leaders from 15 different European and non-European countries have participated in October, 2014, in a one-day lab organised by CAE in Newcastle on how can the cultural sector in Europe measure the impact of cultural activity. Their reflection, prompted by two short introductory presentations, was also oriented by two basic questions, namely:

- How big is the measurement opportunity for me/my organisation?

- How much experience and knowledge my organisation has in dealing with this issue?

The need for <u>effective</u> and <u>appropriate</u> ways for assessing and evaluating the desired social consequences of the activity of the cultural organisations is the main concern emerging from the discussion. Number and indicators are in some cases the most effective language, but sometimes they are not the most appropriate. The need for translation between the quantitative and the qualitative languages and for the creation of a new language has been mentioned by many.

The answer could include a continuum of impacts: from 'knowledge and relationships', through 'values and social capacity' to 'participation and quality'. The group shared good practices such as how to implement the 'Most Significant Change' method of evaluation. All were convinced that numerical data underpinning the arguments for culture are, above all, a necessary means to an end: to build consensus about the value of culture, without being led by them but using them in the most interesting way.

4. TOWARDS A MODEL FOR AN EFFECTIVE METHODOLOGY TO COLLECT COMPARABLE DATA

4.1. The results we expect

We are convinced that culture is a powerful answer to many concerns of our time.

We are proposing ways:

- to appreciate that contribution in communicable terms;

- to compare different situations and practices and learn from the comparison;

- to inspire and orient policy choices and policies at various scales;

- to increase the accountability of the sector at large and of its actors.

We are aware that there are not such things as standard values, optimal performances in this field, and that each individual context produces its own unique interaction with cultural actions because of its specific history, social and economic profile, and background culture. Nonetheless, we expect that relative changes – positive changes – and impacts can be recorded and should be communicated and shared.

4.2. The approach

In consideration of the complexity of the challenge and of the cultural sector, we suggest a *varying geometry* approach, with qualitative and qualitative methods will be used where most appropriate. This entails a sort of Swiss army knife strategy, i.e. the design of a set of different instrument for collecting and organizing information (data, stories, narratives, cases, indicators, etc.).

One possible approach is the *Zero impact hypothesis.* It consists in assuming a hypothetical cultural activity with no social impact at all, and

measuring the deviation of the actual practices from that model. This will lead us to record the smallest change brought about by culture as a traceable element.

4.3. Observed phenomena

Cultural organisations, their audiences, their activities and the (planned and unplanned) social impacts they generate are the main phenomena observed in the project. The assessment process can start from both ends: from the desired social changes or from cultural organisations and their activities. Tests will be run for both options.

4.4. Information format and sources

Numerical indicators and quantitative data on culture are rare to find in appropriate time series, sufficient detail, updated and comparable. They are often derived from different sources, built in different ways for diverse purposes, and address a very narrow palette of phenomena. Other, culture-tailored, ways of collecting, processing, comparing and analysing information are therefore necessary. Thus, sources may vary and information can be derived from existing statistical sources as well as ad hoc surveys and/or information collection of qualitative kind (narratives, etc.).

4.5. Scale

The search for the appropriate scale(s) is a crucial issue when discussing social impact. It involves the availability of data (generally not available below the national/regional-nuts II level), but also, more important, the definition of the basic units involved both in generating and in receiving

the impact. The local micro dimension is probably the best starting point for the analysis.

Our project will try to describe – ex post - what is the impact area of various cultural activities, possibly comparing it with the assumed – ex ante - area.

4.6.   Time and Duration

Regardless of what many politicians expect, culture seldom produces short-term impacts. Although they are less spendable in terms of consensus and votes, mid and long term impacts are very relevant, and should be assessed with the most appropriate method. Long-term impacts are generally more difficult to grasp, and the causal chain leading to them is multiple. The time factor must also been taken into account when considering the duration, nature and intensity of the cultural experience (single, repeated, frequent, individual, collective, etc.) and the duration, nature and intensity of the impacts.

4.7.   Typologies of action

To the purpose of this project, one-time, occasional activities will not be included. Especially for the pilot survey (see below) and the first tests, regular, repeated activities involving the same audience will be preferred. With reference to the statistical definition of the cultural sector in its various domains (heritage, archives, libraries, performing and visual arts, architecture, audio-visual, books and press), eligible actions can be selected among any of them, provided that they satisfy the double condition of duration and homogeneous public.

5. TESTING THE METHODOLOGY @ CAE

5.1. Pilot survey

The pilot stage of the project will be characterised by a *Swiss army knife approach*, using different tools for eliciting as much information as possible on the social impact of cultural activities.

CAE member organizations who will volunteer will be involved in a pilot survey based upon four mean experiences of data collection, i.e.: ad hoc questionnaire; structured storytelling; MSC – Most Significant Change technique; SROI – Social Return on Investments,.

A simple <u>*ad hoc* questionnaire</u> will be designed to collect among the participating CAE members comparable basic descriptive information on the actions – both past and to come - they think have the widest and deeper impact and their stakeholders.

<u>Narratives on cases</u> emerging from the questionnaire will be recorded and organized in a structured way, in the form of a dynamic repository, accessible by operators and scholars.

"<u>The most significant change (MSC)</u> technique is a means of "monitoring without indicators" (but can also be used in evaluations)

MSC is a form of participatory monitoring and evaluation. It is participatory because many project stakeholders are involved both in deciding the sorts of changes to be recorded and in analysing the data collected. It is a form of monitoring because it occurs throughout the program cycle and provides information to help

people manage the program. It contributes to evaluation because it provides data on impact and outcomes that can be used to help assess the performance of the program as a whole.

Essentially, the process involves the collection of significant change (SC) stories emanating from the field level, and the systematic selection of the most significant of these stories by panels of designated stakeholders or staff. (...) MSC is most useful:

• Where it is not possible to predict in any detail or with any certainty what the outcome will be

• Where outcomes will vary widely across beneficiaries

• Where there may not yet be agreements between stakeholders on what outcomes are the most important

• Where interventions are expected to be highly participatory, including any forms of monitoring and evaluation of the results"[22].

As indicated by many participants in CAE Labs in Newcastle, MSC approach is worth adopting when data, indicators and quantitative information is scarce or not adequate to represent the impacts that have occurred.

"SROI – Social return on investment is an approach to understanding and managing the value of the social, economic and environmental outcomes created by an activity or an organisation. It is based on a set of principles that are applied within a framework.

SROI seeks to include the values of people that are often excluded from markets in the same terms as used in markets, that is

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[22] See http://mande.co.uk/special-issues/most-significant-change-msc/

money, in order to give people a voice in resource allocation decisions. (…) SROI is an account of value creation and the account requires a mix of information including qualitative, quantitative and financial."[23] SROI "focuses on answering five key questions:

1. Who changes? Taking account of all the people, organisations and environments affected significantly.

2. How do they change? Focusing on all the important positive and negative changes that take place, not just what was intended.

3. How do you know? Gathering evidence to go beyond individual opinion.

4. How much is you? Taking account of all the other influences that might have changed things for the better (or worse).

5. How important are the changes? Understanding the relative value of the outcomes to all the people, organisations and environments affected. [24]".

SROI seems best suited for those actions which have been implemented with the intentional purpose of generating social impacts.

5.2.   Actors

The project will involve CAE members, on a voluntary basis. Collective actors (companies, groups, etc.) will be preferred to individuals both among the audiences and the artists/organizers.

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[23] http://www.thesroinetwork.org/what-is-sroi
[24] http://www.thesroinetwork.org/sroi-analysis/the-sroi-guide

5.3.   A tentative list of domains

We believe that cultural activities produce a *continuum of impacts* rather than single, separate, distinctive effects on individuals and communities. However, there have been, over the last years, interesting efforts to list the areas where the social impacts of culture can be expected to be greater. The Annex collects a sample of contributions of this kind.

Here we limit ourselves to mention some of the most frequently cited, i.e.:

On the collective level:

- Liveability of places
- Social inclusion
- Cultural diversity, recognition and tolerance
- Empowerment of specific social groups
- Social capital
- Knowledge as common good
- Cooperative action
- New forms of income generation
- New occupations

On the individual level:

- Development of independent, critical thinking
- Development of creative, out-of-the-box thinking
- Self-esteem
- Identity and sense of belonging

- Satisfaction for one's own leisure time

- Increased capacity of self-expression

- Sense of physical well-being

- Sense of psychological well-being

The pilot study will start from the above tentative list, aiming at generating a new one, tested on the field. In the initial stage, each component of the impact list will receive equal weight and involve no ranking.

5.4.   Other methodological aspects

Besides qualitative and qualitative approaches, other aspects will be taken in due account, for the reasons cited earlier: for instance, the cultural quality of the social context where the cultural experience takes place, the possible interaction with other cultural experiences (both simultaneous and past), individual and collective attitudes, etc. The difference between *omnivore* audiences, with high levels of participation/involvement in various cultural experiences and relatively *univore* audiences, with low cultural participation rates should be assessed and recorded.

Along with measures for the ex post evaluation of the social impact, the project will develop tools for ex ante planning of the desired social impacts.

A special thanks to the contribution of Annalisa Cicerchia, CAE scientific co-director.

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ANNEX 1 – ANNOTATED REFERENCES[25]

SUMMARY

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