

IETM MAPPING

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CASE STUDIES: ORGANISATIONS' SURVEYS AND ANNUAL REPORTS

Annex A

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IDD_001. *Australia*

Case study IDD	IDD_001
Name of organisation	Chunky Move
Type of organisation	small, NGO
Country, region	Australia
Art sector	dance
Survey title	--
Year	2009
Research scope	organisation
Research type	self-assessment
Is it part of a bigger evaluation effort?	testing the Artistic Vibrancy model
Research conductor	the organisation
Evaluation components 1	<input type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input checked="" type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey - ongoing
	<input checked="" type="checkbox"/> peer review- informal, at each new work
	<input checked="" type="checkbox"/> funders review – annually, dialogue with funding bodies
	<input checked="" type="checkbox"/> media coverage - ongoing
	<input type="checkbox"/> other
Concept concerning artistic quality	artistic vibrancy
Comments on methodology	The evaluation follows the <u>Artistic Vibrancy</u> model of Australia Council for the Arts.
Recurrence	n/a
Demandability1	n/a
Demandability2	voluntary
Data comparability	partial or none
Findings_narrative	Self-assessment is reported to be a combination of research approach to creative development, external feedback and internal reflection. The external feedback comprises feedback from targeted journalists, audience feedback, feedback from online social media, peer review.
Organisation's website	http://chunkymove.com.au/
Source	<u>Australia Council for the Arts, "Tell me honestly...": Good practice case studies of artistic self-assessment in performing arts organisations, Sydney, Australia Council for the Arts, 2009</u>

IDD_002. *Australia*

Case study IDD	IDD_002
Name of organisation	Lucy Guerin Inc
Type of organisation	small, independent
Country, region	Australia
Art sector	dance
Survey title	--
Year	2009
Research scope	organisation
Research type	self-assessment
Is it part of a bigger evaluation effort?	testing the Artistic Vibrancy model
Research conductor	the organisation
Evaluation components 1	<input type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input checked="" type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey
	<input checked="" type="checkbox"/> peer review – informal, at each new work
	<input type="checkbox"/> funders review
	<input checked="" type="checkbox"/> media coverage- ongoing
	<input checked="" type="checkbox"/> other – ongoing video documentation of work
Concept concerning artistic quality	artistic vibrancy
Comments on methodology	The evaluation follows the <u>Artistic Vibrancy</u> model of Australia Council for the Arts.
Recurrence	n/a
Demandability1	n/a
Demandability2	voluntary
Data comparability	--
Findings_narrative	Self-assessment is reported to be a combination of research approach to creative development, external feedback and internal reflection. The external feedback comprises feedback from targeted journalists, audience feedback, feedback from online social media, peer review. The archive of video documentation is part of the organisation's activity as a research centre but may also serve as a source of evaluation.
Organisation's website	http://lucyguerininc.com/
Source	<u>Australia Council for the Arts, "Tell me honestly...": Good practice case studies of artistic self-assessment in performing arts organisations, Sydney, Australia Council for the Arts, 2009</u>

IDD_003. Australia

Case study IDD	IDD_003
Name of organisation	Malthouse Theatre O1
Type of organisation	large, independent
Country, region	Australia
Art sector	Theatre / dance / music /
Survey title	--
Year	2009
Research scope	organisation
Research type	self-assessment
Is it part of a bigger evaluation effort?	testing the Artistic Vibrancy model
Research conductor	The organisation; Artistic Council and Council Assembly
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input checked="" type="checkbox"/> self-assessment - periodic
	<input checked="" type="checkbox"/> audience survey - periodic
	<input checked="" type="checkbox"/> peer review – both formal and informal, periodic (Artistic Council and Council Assembly)
	<input checked="" type="checkbox"/> funders review – depending on funding agreement
	<input checked="" type="checkbox"/> media coverage - ongoing
	<input checked="" type="checkbox"/> other - Council Assembly twice a year
Concept concerning artistic quality	artistic vibrancy
Comments on methodology	The evaluation follows the <u>Artistic Vibrancy</u> model of Australia Council for the Arts.
Recurrence	annual reports are issued
Demandability1	voluntary
Demandability2	voluntary
Data comparability	--
Findings_narrative	<p>Malthouse's artistic self-assessment is a combination of:</p> <p>Formal methods</p> <ul style="list-style-type: none"> • peer assessment: Artistic Council • community interaction: Council Assemblies • public opinion: solicited and unsolicited • media: media and electronic coverage • audience numbers: box office • formal reporting: acquittals and reports for external funding bodies/trusts (the The Australia Council requires general acquittals covering the company's performance. Trusts and foundations may request more specific reports). <p>Informal methods</p> <ul style="list-style-type: none"> • discussion within the 'Artistic Team' • conversation with freelance artists and designers attending performances • discussion with collaborating creative teams and actors
Organisation's website	http://malthousetheatre.com.au/
Source	Australia Council for the Arts, "Tell me honestly...": Good practice case studies of artistic self-assessment in performing arts organisations, Sydney, Australia Council for the Arts, 2009 (pp. 31-38)

IDD_004. *Australia*

Case study IDD	IDD_004
Name of organisation	Malthouse Theatre 02
Type of organisation	large, independent
Country, region	Australia
Art sector	theatre / dance / music /
Survey title	Annual Report
Year	2013
Research scope	organisation
Research type	annual report; independent audit
Is it part of a bigger evaluation effort?	The Malthouse Theatre publishes its annual reports from 2008 on.
Research conductor	the organisation; independent audit company
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input type="checkbox"/> other
Concept concerning artistic quality	artistic vibrancy (2008-2011) artistic excellence (2012, 2013)
Comments on methodology	The annual report follows a rigid structure featuring financial reporting, administrative information as well as reporting on key performance indicators, peer review internal assessment, board review, and evaluation of artistic vibrancy (2008-2011) or artistic development and artistic excellence (2012, 2013).
Recurrence	annual
Demandability1	required
Demandability2	required
Data comparability	yes

Findings_narrative	<p>The Annual report comprises: Chair's report, Executive report, Repertoire, Touring, Education, Additional activities, Artistic development, Board, staff and partners, Key performance indicators (KPI), Financial report.</p> <p>In the <u>2008-2011 programming period</u> the artistic quality concept in KPI was artistic vibrancy. In 2009, the KPI comprised of:</p> <p>Artistic vibrancy report: Minimum investment of \$ 100K in commissions, workshops and new works; Programming at least 50% world premiers; Securing at least three major collaborations; Commission at least four works; Increase Artist in Residence</p> <p>Audience development and access</p> <p>Financial viability, management and governance</p> <p>The new <u>programming period (2012-2014)</u> introduced new KPI framework stated in <u>2012 Annual Report</u> (pp. 28-29).</p> <p>In <u>2013 Annual report</u> (pp. 30-31) 'artistic vibrancy' is replaced by the generalisation 'artform' and the KPI changes from numeric targets to outcomes Target goals (measurable) are taken down to the operational level which on the whole, makes the KPI framework more manageable and clear:</p> <p>Artform: Outcomes: artistic quality and excellence of craft; audience engagement and stimulation; examination and extension of artforms; development of artists</p> <p>Access</p> <p>Sector development</p> <p>Financial</p> <p>Here is an example of one thread of the framework:</p> <p>Outcome [audience engagement and stimulation] > Mechanism [survey] > Measure [audience satisfaction] > 2013 target [55%] > 2013 Actual [94% either satisfied or very satisfied]</p>
Organisation's website	http://malthousetheatre.com.au/
Source	http://malthousetheatre.com.au/about-us/publications http://malthousetheatre.com.au/site/assets/uploads/24ec314e-2013_annualreport_fasingles.pdf

IDD_005. *Australia*

Case study IDD	IDD_005
Name of organisation	The Australian Ballet (TAB) O1
Type of organisation	large
Country, region	Australia
Art sector	dance
Survey title	--
Year	2009
Research scope	organisation
Research type	self-assessment
Is it part of a bigger evaluation effort?	testing the Artistic Vibrancy model
Research conductor	The organisation
Evaluation components 1	<input type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input checked="" type="checkbox"/> self-assessment – annual for the dancers; informal: weekly
	<input checked="" type="checkbox"/> audience survey - ongoing
	<input checked="" type="checkbox"/> peer review – done at each event; artists in residence provide feedback; every few years
	<input type="checkbox"/> funders review
	<input checked="" type="checkbox"/> media coverage - ongoing
	<input type="checkbox"/> other
Concept concerning artistic quality	artistic vibrancy
Comments on methodology	The evaluation follows the <u>Artistic Vibrancy</u> model of Australia Council for the Arts.
Recurrence	--
Demandability1	required / optional / voluntary/n.a.
Demandability2	voluntary
Data comparability	--
Findings_narrative	TAB's artistic self-assessment is a combination of: Peer review: international guest artists' and trainers' views; "big picture" sector review by TAB artistic director and international artistic directors; international tour assessment, trialled in 2005 Dancer performance review, including self-assessment: annual performance review; informal conversations with the artistic director about career development Artistic reports to the board: audience feedback; media review; guest artist and trainers' feedback Informal self-assessment: informal reflection on commissioned works by the artistic director; regular meetings with the company's artistic staff.
Organisation's website	https://www.australianballet.com.au/
Source	Australia Council for the Arts, "Tell me honestly...": Good practice case studies of artistic self-assessment in performing arts organisations, Sydney, Australia Council for the Arts, 2009

IDD_006. *Australia*

Case study IDD	IDD_006
Name of organisation	The Australian Ballet (TAB) O2
Type of organisation	large
Country, region	Australia
Art sector	dance
Survey title	Annual report 2013
Year	2013
Research scope	organisation
Research type	Self-assessment; independent audit
Is it part of a bigger evaluation effort?	testing the Artistic Vibrancy model
Research conductor	The organisation; independent audit
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input checked="" type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey
	<input checked="" type="checkbox"/> peer review
	<input checked="" type="checkbox"/> funders review
	<input checked="" type="checkbox"/> media
	<input checked="" type="checkbox"/> other: documentation
Concept concerning artistic quality	artistic vibrancy
Comments on methodology	The report is highly numerical, featuring infographics on box office results, visits, number of performances, participants in educational event, for example: "In 2013 The Australian Ballet presented 188 performances of 21 ballets to 258,138 people, generating a total of \$24.3 million in box-office revenue across all performances, education and public program events." (p. 14).
Recurrence	annually
Demandability1	required
Demandability2	voluntary
Data comparability	yes

Findings_narrative	<p>The report comprises the following: Performance and Access Schedule; Ballet Footprint; Chairman’s Review; Executive Director’s Report; Artistic Director’s Report; Board of Directors; The Year in Review; Creating Inspiring Performances; Key Performance Indicators; Financial Report; Foundation Chair Report; Financial Support; Partners; Company and Directors.</p> <p>The Artistic Vibrancy case studies report (2009) has affirmed TAB conducts regular artistic self-assessment “to help it achieve world-class standards, support dancers’ careers, and develop the ballet art form.” None of the self-assessment components is included in the 2013 Annual report though. Its key focus is on numeric values, which are convincingly showcased in infographics; the ballet productions are convincingly presented by beautiful photos and information on performances, paid attendances and gross revenue. Selected media reviews of the performances are cited. The ‘artistic vibrancy’ concept is also represented by measurable KPIs:</p> <p>KPI on artistic vibrancy (profile of works)</p> <p>Australian/ International: New commissions; New acquisitions; Revivals; Revivals Presented by The Australian Ballet (p. 20)</p>
Organisation’s website	https://www.australianballet.com.au/
Source	Annual Report 2013

IDD_007. Bulgaria

Case study IDD	IDD_007
Name of organisation	Sofia Municipality
Type of organisation	state, large, medium, small, independent
Country, region	Bulgaria
Art sector	theatre / dance / music / festival - all
Survey title	External Monitoring of the Events in the Cultural Calendar of Sofia Municipality
Year	2013 - 2014
Research scope	culture/ programme
Research type	external evaluation
Is it part of a bigger evaluation effort?	The municipality of Sofia commissioned a survey of all external (i.e. not in the programmes of municipal or state culture institutions) initiatives funded under the municipal culture programme aka <u>Sofia Cultural Calendar</u> .
Research conductor	third party: Alpha Research
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input checked="" type="checkbox"/> media coverage
	<input checked="" type="checkbox"/> other: on-spot monitoring, interviews with organisers
Concept concerning artistic quality	none
Comments on methodology	The methodology and the indicators were elaborated after discussions with experts and stakeholders. The survey consisted of on-spot monitoring, audience survey, interviews with the organisers, media monitoring. The survey system was designed as an all-purpose instrument, therefore an index based on a formula was applied in order to compare various events: audience's overall satisfaction 60%, organisers' satisfaction with the size of the audience 20%, media- number of publications and tone of materials 20%.
Recurrence	n/a
Demandability1	n/a
Demandability2	n/a
Data comparability	n/a
Findings_narrative	The festivals and events were ranked according to a formula in which the overall audience satisfaction weighed the most. The analysis juxtaposes the ranking results and the municipal spending for the events. Some recommendations on audience development are listed.
Organisation's website	Sofia Municipal Culture Programme: http://www.sofiaculture.bg/index.php?show=programa Alpha research agency: http://alpharesearch.bg/en.html
Source	http://www.sofiaculture.bg/files/AR_presentation_culture_2015.pdf (in Bulgarian)

IDD_008. *Hong Kong, China*

Case study IDD	IDD_008
Name of organisation	The Hong Kong Philharmonic Society (HKPhil)
Type of organisation	state, large
Country, region	Hong Kong, China
Art sector	music
Survey title	HKPhil 2013/14 Annual Report
Year	2013-2014
Research scope	organisation
Research type	self-assessment
Is it part of a bigger evaluation effort?	annual reporting procedure
Research conductor	the organisation / the funder / third party
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input checked="" type="checkbox"/> self-assessment
	<input type="checkbox"/> audience survey
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input checked="" type="checkbox"/> media – critical acclaim
	<input type="checkbox"/> other
Concept concerning artistic quality	artistic excellence
Comments on methodology	In relation to quality, artistic excellence, impact on society, the report builds rather on narrative from a reliable source (Chairman's report) than on evidence that is gathered through a survey. The financial part presents highlights from the financial report, there is no audit verification stated. A detailed repertoire presentation, which is typical for annual reports, is part of the HK Phil's report too. Critical reviews are cited to showcase critical acclaim for the productions.
Recurrence	annual
Demandability1	n/a
Demandability2	n/a
Data comparability	partial

Findings_narrative	<p>The report comprises the Chairman's report, citations of critical acclaim, presentation of the HK Phil repertoire, programme for the period and musicians, financial highlights, performances and activities' overview, acknowledgement of partners.</p> <p>The concept of artistic excellence evolves through the Chairman's narrative (pp. 3-12). First of all, it is testified by the richness and refinement of the repertoire and the intensive programming of performances. Then a list of international collaborations follows, including work with world-famous conductors. The intense touring programme is also an argument for the artistic excellence of the organisation. Other topics of quality that have their place in the Chairman's report are: fostering of local artistic talent; promoting industry development (by playing both classical Western repertoire and work of Chinese composers and by releasing CDs featuring local soloists); audience building initiatives and arts education; cultural exchange and cooperation; governance and management; financial fitness.</p>
Organisation's website	http://www.hkphil.org/eng/home/index.jsp
Source	HK Phil 2013/14 Annual Report

IDD_009. Hong Kong, China

Case study IDD	IDD_009
Name of organisation	< Major Performing Arts Groups in Hong Kong>
Type of organisation	state, large
Country, region	Hong Kong, China
Art sector	theatre / dance / music
Survey title	<p>How far can financial indicators be applied in the evaluation of not-for-profit arts organizations ?</p> <p>A case study on the evolution of the funding mechanism for Major Performing Arts Groups in Hong Kong</p> <p>author: Sun-man TSENG, Adjunct Professor at Arts Management and Entrepreneurship Hong Kong Institute of Education</p> <p>presentation at: 22nd ENCATC Annual Conference, September 2014 Brno</p>
Year	2014 (presented)
Research scope	Culture/ programme
Research type	external evaluation
Is it part of a bigger evaluation effort?	narrative
Research conductor	third party
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input type="checkbox"/> self-assessment
	<input type="checkbox"/> audience survey
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input type="checkbox"/> other
Concept concerning artistic quality	artistic excellence / artistic vibrancy
Comments on methodology	--
Recurrence	--
Demandability1	voluntary
Demandability2	voluntary
Data comparability	--
Findings_narrative	Administrative data: Survey evidence: Dedicated staff:
Organisation's website	http://www.encatc.org/pages/index.php
Source	power point presentation

IDD_010. Hungary

Case study IDD	IDD_010
Name of organisation	Contemporary Drama Festival, Budapest, Hungary (DF)
Type of organisation	independent
Country, region	Hungary
Art sector	festival performing arts festival
Survey title	n/a
Year	2012
Research scope	event
Research type	self-assessment / external evaluation / mixed
Is it part of a bigger evaluation effort?	--
Research conductor	the organisation
Evaluation components 1	<input type="checkbox"/> quantitative data
Evaluation components 2	<input checked="" type="checkbox"/> qualitative survey components
	<input type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input type="checkbox"/> other
Concept concerning artistic quality	n/a
Comments on methodology	The research activities are part of audience development efforts.
Recurrence	ongoing
Demandability1	--
Demandability2	voluntary
Data comparability	--
Findings_narrative	"Regarding audience research their priority is Facebook statistics, and analytics on the behaviour of visitors. Besides this they ask questions from the visitors on Facebook, for foreign visitors they send a questionnaire after the festival. Programming and logistics are keen to know the feedback from the audience." p. 35
Organisation's website	www.dramafestival.hu
Source	<i>Audience building and the future Creative Europe Programme</i> by Anne Bamford and Michael Wimmer EENC Short Report, January 2012

IDD_011. Hungary

Case study IDD	IDD_011
Name of organisation	Hungarian National Philharmonic Orchestra, Choir and Library (HNPOCL)
Type of organisation	state, large, public
Country, region	Hungary
Art sector	music
Survey title	--
Year	2012
Research scope	organisation
Research type	self-assessment
Is it part of a bigger evaluation effort?	within audience development efforts
Research conductor	the organisation
Evaluation components 1	<input checked="" type="checkbox"/> quantitative data
Evaluation components 2	<input type="checkbox"/> qualitative survey components
	<input type="checkbox"/> self-assessment – n/a
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review – n/a
	<input type="checkbox"/> funders review – n/a
	<input type="checkbox"/> media – n/a
	<input type="checkbox"/> other
Concept concerning artistic quality	artistic quality and value
Comments on methodology	Qualitative data is being gathered through focus groups.
Recurrence	twice a year
Demandability1	n/a
Demandability2	n/a
Data comparability	Yes – within the organisation over the years
Findings_narrative	<p>Quantitative data: box office results. "Success is measured by the number of tickets sold." (pp. 41)</p> <p>Qualitative data: surveys; focus groups</p> <p>Research data is based on electronic name and address list. In the 1990's they tried self-completed survey returned by post, but less than 10% returned and was misleading. They have faced the problems of surveys and decided to focus on representative groups and ask them about the programme, the starting hours, likes and dislikes (image of the Philharmonic). These kinds of focus group interviews are organised in every half year and collect 10-12 persons for an occasion and record an interview with them. It turned out from the focus group interviews that the audience wishes to see more Vienna classics, Mozart pieces, romantic pieces, and the piano playing of the conductor Zoltán Kocsis on Mozart and Beethoven." (pp. 41-42)</p>
Organisation's website	www.filharmonikusok.hu
Source	<i>Audience building and the future Creative Europe Programme</i> by Anne Bamford and Michael Wimmer EENC Short Report, January 2012

IDD_012. Hungary

Case study IDD	IDD_012
Name of organisation	Festivals in Hungary (national survey) 01
Type of organisation	any
Country, region	Hungary
Art sector	festivals (230 festivals of different kinds were object of survey)
Survey title	Festival-world. National Survey on Festivals in Hungary Including Deliberations on Public Funding, Evaluation and Monitoring Summary report authors: Zsuzsa Hunyadi, Péter Inkei, János Zoltán Szabó
Year	2004 – 2006 (year of publication: 2006)
Research scope	sector; national level
Research type	external evaluation
Is it part of a bigger evaluation effort?	In 2004 the National Cultural Fund (NKA) decided to initiate a strategic research in various fields of culture amongst which, on the importance of cultural festivals in regards to tourism. Certain specific questions of interest were: How is it possible to select between the different festivals? How can it be checked if the subsidy was appropriately (or inappropriately) awarded? The NKA was founded to promote cultural projects: to what extent can it undertake the consolidation of the festival industry? (p. 5)
Research conductor	third party: The Budapest Observatory
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input checked="" type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review – n/a
	<input checked="" type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input checked="" type="checkbox"/> other: municipal stakeholders interviews; desk research
Concept concerning artistic quality	none: festivals are reviewed with regard to tourism

Comments on methodology	<p>The questionnaires were applied to nearly 300 festivals. Desk research through the 2004 NKA database was carried out. Hungarian festivals were reviewed in the international context as well. The main segments of the research were as follows:</p> <ul style="list-style-type: none"> • Interviewing the visitors to six festivals • Processing 15 interviews with municipal authorities • Processing nine interviews with sponsors • Qualitative and quantitative evaluation of 230 questionnaires and 13 interviews conducted with festival organisers • Evaluation of the programme of 230 festivals, according to a set of criteria • Analysis of the festival-supporting practice of the NKA in 2004 • Presentation of the monitoring experience of funds based in Hungary or in the European Union (p. 6)
Recurrence	follow up 2010 survey of Hungarian festivals
Demandability1	n/a
Demandability2	n/a
Data comparability	yes
Findings_narrative	<p>The report summarises the findings of the research on the Hungarian festival scene carried out in 2004-2005, completed with information on public financial support to festivals in 2006. In compliance with the initial goals of the survey, the focus lies on the economic impact of the festivals, their impact on tourism. A separate chapter is dedicated to the analysis of state support for the festivals.</p> <p>Topics of the report: The role of festivals in cultural life; the economic role of festivals; the social impact of festivals (pp. 20-23); financing festivals.</p>
Organisation's website	The Budapest Observatory
Source	http://www.budobs.org/pdf/Festival_en.pdf

IDD_013. Hungary

Case study IDD	IDD_013
Name of organisation	Festivals in Hungary (national survey) 02
Type of organisation	State, large, medium, small, independent
Country, region	Hungary
Art sector	festival
Survey title	The Rating System of Hungarian Festivals Péter Inkei, The Budapest Observatory
Year	2010
Research scope	sector; national level
Research type	external evaluation
Is it part of a bigger evaluation effort?	"The issue of the distribution of public funds for festivals was the main driver for more systematic evaluation of festivals. The need was less articulate on the funders' side than among the festival organisers, motivated by self-confidence and the spirit of rivalry. There was increasing pressure on the authorities for more predictable funding practices." (p. 4)
Research conductor	third party: The Budapest Observatory through a Managing Board (5 members)
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input type="checkbox"/> self-assessment
	<input type="checkbox"/> audience survey
	<input checked="" type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input checked="" type="checkbox"/> other – monitors survey on spot; board's decision
Concept concerning artistic quality	'Qualified Festival': ranking of festivals according to a set of 22+ criteria (Annex 3, pp. 19-26)
Comments on methodology	The ranking was conducted through the following steps: <ul style="list-style-type: none"> • voluntary registry of the festival which requires certain administrative / financial / background data • on spot evaluation by trained monitors against a scoring guide • Managing Board's decision
Recurrence	n/a
Demandability1	voluntary: registration for the ranking is voluntary
Demandability2	voluntary
Data comparability	partial

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Findings_narrative	<p>The central element of the qualification and rating process is the scoring done by the visiting monitors. The actual instance of qualification and rating is done by the Board. Festivals receive their ranking for a period of two years. When the title expires, they can voluntarily apply for new ranking. The process is reviewed according to key elements and challenges (pp. 8-12).</p> <p>Annex 3 (pp. 19-26) presents the 22+ qualification criteria. Here are just a few: singularity; programme structure; performers, artists, participants; innovation; international presence; national assets; local integration; venues; social integration, creating opportunities; environmental awareness...</p> <p>Annex 4 (pp. 27-28) is the ranking of festivals for 2010.</p>
Organisation's website	<p>http://www.budobs.org</p>
Source	<p>http://www.budobs.org/pdf/HU_festrating.pdf</p>

IDD_014. *Latvia*

Case study IDD	IDD_014
Name of organisation	Latvian National Opera, Riga, Latvia
Type of organisation	state, large, national
Country, region	Latvia
Art sector	music
Survey title	--
Year	2012
Research scope	culture/ programme/ sector / organisation / event
Research type	self-assessment / external evaluation / mixed
Is it part of a bigger evaluation effort?	audience development efforts
Research conductor	the organisation
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions) – no!
	<input type="checkbox"/> self-assessment
	<input type="checkbox"/> audience survey – not performed
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input type="checkbox"/> other
Concept concerning artistic quality	no
Comments on methodology	Data gathered through quantitative indicators feed into the programming decisions.
Recurrence	periodically
Demandability1	voluntary
Demandability2	--
Data comparability	yes
Findings_narrative	Quantitative data: box office results, attendance rates Quantitative data is used as input information to programming and repertoire scheduling. Qualitative evidence: None as of 2012. "Doing visitors' survey based on questionnaires is not a practice yet." (pp. 44) Dedicated staff: staff for audience development
Organisation's website	www.opera.lv/en
Source	<i>Audience building and the future Creative Europe Programme</i> by Anne Bamford and Michael Wimmer EENC Short Report, January 2012

IDD_015. Norway

Case study IDD	IDD_015
Name of organisation	The National Theatre, Norway
Type of organisation	state, large
Country, region	Norway
Art sector	theatre
Survey title	Annual 2013
Year	2013
Research scope	programme/ sector / organisation
Research type	mixed: self-assessment and external evaluation
Is it part of a bigger evaluation effort?	In 2013 the Ministry of Culture conducted an evaluation of three institutional theatres: National, Rogaland Theatre and Sogn og Fjordane Theatre. The purpose of the evaluation was to obtain information and insights that can illuminate how institutions contribute to the main goals of performing arts. * Automatic translation from Norwegian
Research conductor	the organisation / third party
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input checked="" type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey
	<input checked="" type="checkbox"/> peer review
	<input checked="" type="checkbox"/> funders review
	<input checked="" type="checkbox"/> media coverage
	<input type="checkbox"/> other
Concept concerning artistic quality	artistic quality
Comments on methodology	Qualitative dimensions are difficult to measure through purely objective indicators. Therefore, the Ministry of Culture chose a model for the assessment of artistic quality based on the Danish Dowsing model (danske Ønskekvistmodellen). The model does not provide for a complete set of performance indicators, but rather allows for a systematic and nuanced dialogue between the institution and the evaluation body about artistic quality.
Recurrence	n/a
Demandability1	required
Demandability2	required
Data comparability	

Findings_narrative	<p>At the first step of the evaluation, the theatre conducted self-evaluation. The results from the self-assessment, together with other relevant information about the theatre, was part of the final assessment performed by a panel of experts appointed by the Ministry of Culture. It was the panel's conclusion that during the evaluation period the National Theatre has shown great artistic achievement in its artistic work in several aspects: repertoire, choice of theatre directors, plays and artistic concepts as well as emerging and innovative art forms and artistic curiosity. The theatre tends to keep on the safe side and involves less innovation when developing new theatrical experiences for children and adolescents. Otherwise, the theatre exercises its best expertise for most of the features and activities in the artistic process and it makes good use of the resources available. The theatre repertoire is relevant to both cultural heritage and current social themes. The National Theatre plays an important role in the Norwegian performing arts landscape. The panel will support the theatre's own ambition to become more visible in public discussions concerning the performing arts field development.</p> <p>"The panel is left with the impression that the National is a well run theatre and through good and competent governance manages its resources well and systematically. Both the administrative and technical theatre competence appear to be solid. The National Theatre is however a large and complex business with a long history. Increased dynamics demand for changes. The panel believes that it is both willingness and ability of the theatre management to work continuously and systematically on this." (pp.53-54)</p>
Organisation's website	http://www.nationaltheatret.no
Source	<p>http://www.nationaltheatret.no/filestore/rsrapport_2013-25-juni.pdf</p> <p>The text of the survey is not available in full version. The citation above is from the latest annual report of the National Theatre which comprises repertoire review, staff review, box office results, expenditure check and more.</p>

Official Norwegian Report on Cultural Policy 2014: https://www.regjeringen.no/globalassets/upload/kud/kunstavdelingen/rapporter_utredninger/kulturutredningen_2014-official_norwegian_report_on_cultural_policy_2014.pdf

IDD__016. Poland

Case study IDD	IDD_016
Name of organisation	Re:visions Festival, Fundacja Impact (PL)
Type of organisation	independent
Country, region	Poland
Art sector	festival
Survey title	--
Year	2007, 2008, 2009
Research scope	organisation / event
Research type	self-assessment / external evaluation / mixed
Is it part of a bigger evaluation effort?	The organisation initiates a series of audience development activities: trainings, seminars, workshops, the festival.
Research conductor	the organisation
Evaluation components 1	<input checked="" type="checkbox"/> quantitative data
Evaluation components 2	<input checked="" type="checkbox"/> qualitative survey components
	<input type="checkbox"/> self-assessment - n/a
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review - n/a
	<input type="checkbox"/> funders review - n/a
	<input type="checkbox"/> media - n/a
	<input checked="" type="checkbox"/> other - documentation, repertoire
Concept concerning artistic quality	quality of programme (according to audiences)
Comments on methodology	audience development efforts
Recurrence	annual at each event
Demandability1	voluntary
Demandability2	voluntary
Data comparability	--
Findings_narrative	<p>Quantitative data gathered: number of visitors, # of regular visitors, number of web visits, number of internet responses</p> <p>Qualitative data: feedback from the audience (the evaluation feeds the next programming). Survey is done via questionnaires (printed form, random, volunteers ask selected people)</p> <p>The quality of the programme is also assessed.</p> <p>The organisation now seems to refocus its activities on audience development workshops for organisations.</p>
Organisation's website	http://www.art-impact.pl/en/ http://rozwojwidowni.pl/18_more_info
Source	Audience building and the future Creative Europe Programme by Anne Bamford and Michael Wimmer EENC Short Report, January 2012

IDD_017. Slovakia

Case study IDD	IDD_017
Name of organisation	Thalia Theatre
Type of organisation	small, municipal
Country, region	Slovakia
Art sector	theatre performing arts, minority culture
Survey title	--
Year	2012
Research scope	organisation
Research type	self-assessment
Is it part of a bigger evaluation effort?	--
Research conductor	the organisation / the funder / third party
Evaluation components 1	<input checked="" type="checkbox"/> quantitative data
Evaluation components 2	<input type="checkbox"/> qualitative survey components
	<input type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey - limited
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input type="checkbox"/> other
Concept concerning artistic quality	artistic excellence / artistic vibrancy
Comments on methodology	--
Recurrence	sporadic
Demandability1	voluntary
Demandability2	required / optional / voluntary/na
Data comparability	
Findings_narrative	Quantitative data: number of visits Qualitative evidence: Limited resources. Feedback from user groups is not regularly considered, there is not enough capacity for this. Something started but the front office is exhausted. (pp. 46) They have organised a survey among the visitors Dedicated staff: none
Organisation's website	http://www.thaliasinhaz.sk/new/
Source	<i>Audience building and the future Creative Europe Programme</i> by Anne Bamford and Michael Wimmer EENC Short Report, January 2012

IDD_018. *Spain, Catalonia*

Case study IDD	IDD_018
Name of organisation	Apropa Cultura' (Culture Brought Closer)
Type of organisation	consortium
Country, region	Spain, Catalonia
Art sector	theatre / dance / music / festival
Survey title	-
Year	2012
Research scope	programme
Research type	self-assessment
Is it part of a bigger evaluation effort?	Apropa Cultura is a socio-educative programme of social inclusion through culture for people at risk of social exclusion. It is a joint partnership of several arts institutions and its audience development efforts are targeted at people at risk of exclusion. Impact evaluation results serve this goal.
Research conductor	the organisation
Evaluation components 1	<input checked="" type="checkbox"/> administrative data
Evaluation components 2	<input checked="" type="checkbox"/> survey components
	<input type="checkbox"/> self-assessment – n/a
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input type="checkbox"/> other
Concept concerning artistic quality	no
Comments on methodology	Specific target audience development is the objective that guides the surveys.
Recurrence	regular quantitative data collection; regular questionnaires with the audience; occasional survey analyses
Demandability1	voluntary
Demandability2	voluntary
Data comparability	-
Findings_narrative	Administrative data: number of visits from the target group. Survey evidence: target group visitors are presented with evaluation surveys to describe and assess their experience. Occasionally research studies have also analysed the results and nature of the programme. No reports are found on the organizations website. Dedicated staff: yes
Organisation's website	http://audienceseurope.weebly.com/
Source	<i>Audience building and the future Creative Europe Programme</i> by Anne Bamford and Michael Wimmer EENC Short Report, January 2012

IDD__019. UK

Case study IDD	IDD_019
Name of organisation	Glyndebourne
Type of organisation	independent opera house; Arts Council funding for some of the educational initiatives
Country, region	UK
Art sector	music
Survey title	-
Year	2012
Research scope	organisation
Research type	audience survey
Is it part of a bigger evaluation effort?	audience survey is to feed audience development efforts.
Research conductor	the organisation
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.) – n/a
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input type="checkbox"/> self-assessment
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input type="checkbox"/> other
Concept concerning artistic quality	n/a
Comments on methodology	qualitative survey of visitors' opinion done online
Recurrence	ongoing
Demandability1	voluntary
Demandability2	voluntary
Data comparability	--
Findings_narrative	Administrative data: Survey evidence: Qualitative survey through the company's website: "individuals are encouraged to feedback on their experience of either the productions or audience participation events at Glyndebourne, providing valuable audience research which is then used to improve future audience development" (pp.54) Dedicated staff: n/a
Organisation's website	http://www.glyndebourne.com
Source	<i>Audience building and the future Creative Europe Programme</i> by Anne Bamford and Michael Wimmer EENC Short Report, January 2012

IDD__020. UK

Case study IDD	IDD_020
Name of organisation	Glyndebourne
Type of organisation	independent opera house; Arts Council funding for some of the educational initiatives
Country, region	UK
Art sector	music; opera house
Survey title	The Economic Impact of Glyndebourne Glyndebourne and East Sussex County Council
Year	2013
Research scope	organisation and local economy
Research type	economic impact survey
Is it part of a bigger evaluation effort?	First survey of Glyndebourne's impact on the East Sussex economy. The report examines all aspects of Glyndebourne's impact to reveal how it supports the local economy.
Research conductor	third party: BOP Consulting The independent research was funded by Arts Council England, East Sussex County Council, Glyndebourne and the East Sussex Arts Partnership
Evaluation components 1	<input checked="" type="checkbox"/> administrative data (i.e. box office results, # of visits, revenue, etc.)
Evaluation components 2	<input checked="" type="checkbox"/> survey components (qualitative: interview, focus group and quantitative: questionnaires with closed questions)
	<input checked="" type="checkbox"/> staff assessment
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review
	<input checked="" type="checkbox"/> funders review
	<input type="checkbox"/> media coverage
	<input checked="" type="checkbox"/> other: stakeholders interviews – municipality; local businesses; the media
Concept concerning artistic quality	None. The survey is focused on the economic impact of the arts organisation.
Comments on methodology	BOP applied the Impact Evaluation Framework (IEF) methodology. Six impact steams: Audience spending during the Festival; Audience spending around Tour performance; Wage expenditure; Supplier expenditure; Spending by visiting artists; Accommodation for visiting artists. The sum of this spending is the gross economic impact on the local economy. Then the gross economic impact is adjusted to take account of additional effects. Once applied, the adjusted total is multiplied to account for the secondary effects of spending in the local economy. The final stage is to convert the net impact into the contribution to the economy's GVA that Glyndebourne can be credited with and to assess the number of full-time jobs that it can be said to support in each sector of local economy. Online audience survey with 3000 respondents.
Recurrence	2013
Demandability1	voluntary
Demandability2	voluntary
Data comparability	yes, IEF methodology

<p>Findings_narrative</p>	<p>Some of the key findings:</p> <p>Glyndebourne generates a gross economic impact of £16.2m in East Sussex which translates into a Gross Value Added (GVA)₁ impact of £10.8m; the equivalent of supporting 682 permanent jobs.</p> <p>Glyndebourne attracts a large, loyal and relatively high-spending audience into East Sussex who spend over £11m at local hotels, restaurants, shops and attractions.</p> <p>Glyndebourne pays more than £3m in wages to employees living in East Sussex.</p> <p>Glyndebourne spends over £1m with Lewes-based suppliers and a further £0.3million with suppliers in the rest of East Sussex.</p> <p>Glyndebourne brings visitors, artists and jobs to Lewes and its presence has encouraged specialist businesses to start up there.</p> <p>Local businesses that work with Glyndebourne say that they have gained revenue, prestige and visitor footfall.</p>
<p>Organisation's website</p>	<p>http://www.glyndebourne.com</p>
<p>Source</p>	<p>http://www.glyndebourne.com/about-us/glyndebourne-economic-impact-report-2014/</p>

IDD__021. *Canada*

Case study IDD	IDD_021
Name of organisation	Canada Council of the Arts - dance
Type of organisation	council of arts
Country, region	Canada
Art sector	dance
Survey title	Findings from Yes I Dance: A Survey of who Dances in Canada
Year	2014
Research scope	sector
Research type	national survey of participants in dance practices
Is it part of a bigger evaluation effort?	-
Research conductor	the organisation with a third party: EKOS
Evaluation components 1	<input checked="" type="checkbox"/> administrative data
Evaluation components 2	<input checked="" type="checkbox"/> survey components
	<input type="checkbox"/> self-assessment – n/a
	<input checked="" type="checkbox"/> audience survey
	<input type="checkbox"/> peer review
	<input type="checkbox"/> funders review
	<input type="checkbox"/> media
	<input type="checkbox"/> other
Concept concerning artistic quality	no
Comments on methodology	<p>The survey was open to all people living in Canada ages 16 and older who dance, teach dance, or choreograph dance in some type of organized or on-going way.</p> <p>Responses were collected from November 19, 2013 to January 31, 2014. A total of 8.124 responses were collected over this time.</p> <p>The survey tool was comprised of 31 questions, with one section of the survey administered only to respondents who identified themselves as professionals in dance.</p> <p>EKOS developed an online registry tool to allow organizations to register.</p> <p>The survey team enlisted the assistance of a 14 member panel of experts for feedback.</p> <p>The survey questionnaire was then pre-tested in English and French with roughly 100 individuals.</p> <p>The survey was accessed using an open web link (www.ekos.com/yesidance-survey). A web link accessible to respondents using screen-reading technology was also made available. E-mail, telephone and staff on hand were available for assistance.</p>
Recurrence	-
Demandability1	-
Demandability2	-
Data comparability	-

<p>Findings_narrative</p>	<p>The sample of 8,124 respondents to the survey includes 2,176 individuals, or 27 per cent, who are dance professionals and 5,948, or 73 per cent, who are leisure dance participants. In most areas of the report, findings are reported separately for dance professionals and leisure dance participants. The overall sample is well represented by all age groups, from teens aged 16 and 17 (3 per cent) to those over 65 (15 per cent), although seniors are much less represented among dance professionals (three per cent). The average age is 45 among leisure dance participants and 36 among dance professionals. One in five in the sample is male.</p> <p>Variety of Dance Forms are Represented.</p> <p>Dance professionals spend an average of 17.7 hours per week in dance. Leisure dance participants say they devote 6.5 hours per week to their involvement in dance, although this declines with age. Most survey respondents tell us that they participate in dance through a variety of means. They dance with group (78 per cent) and/or take classes (82 per cent). Almost half say they teach in some form of dance (44 per cent) and/or create dance (46 per cent).</p> <p>Survey findings put enjoyment at the top of the list of primary reasons for involvement in dance when both dance professionals and leisure dance participants are looked at together. Dance professionals, however, have fairly different motives for dance compared with leisure dance participants.</p> <p>The 27 per cent of survey respondents who are dance professionals reported an average of 11.7 years of earning dance income.</p> <p>The average income earned by dance professionals in the survey, in their primary role, is \$11,207. This is highest among teachers (\$14,170), followed by choreographers (\$10,385), with dancers reporting the least income (\$6,715). Across the different roles, incomes increase with age of the dance professional (until age</p> <p>65). Men typically report higher incomes than women in the roles of dancer and, in particular, choreographer. On the other hand, in teaching it is women who typically report higher incomes than men.</p>
<p>Organisation's website</p>	<p>http://canadacouncil.ca</p>
<p>Source</p>	<p>http://canadacouncil.ca/council/research/find-research</p>