



# South African Cultural Observatory

## *Monitoring & Evaluation:*

Key Development Indicator Report on a DAC  
Interventions

*Analysis of a sample of events under the Mzansi's  
Golden Economy Initiative*

**Intervention:** Udomo Entertainers - Youth Dance Event

Submitted to the Department of Arts and Culture



arts & culture

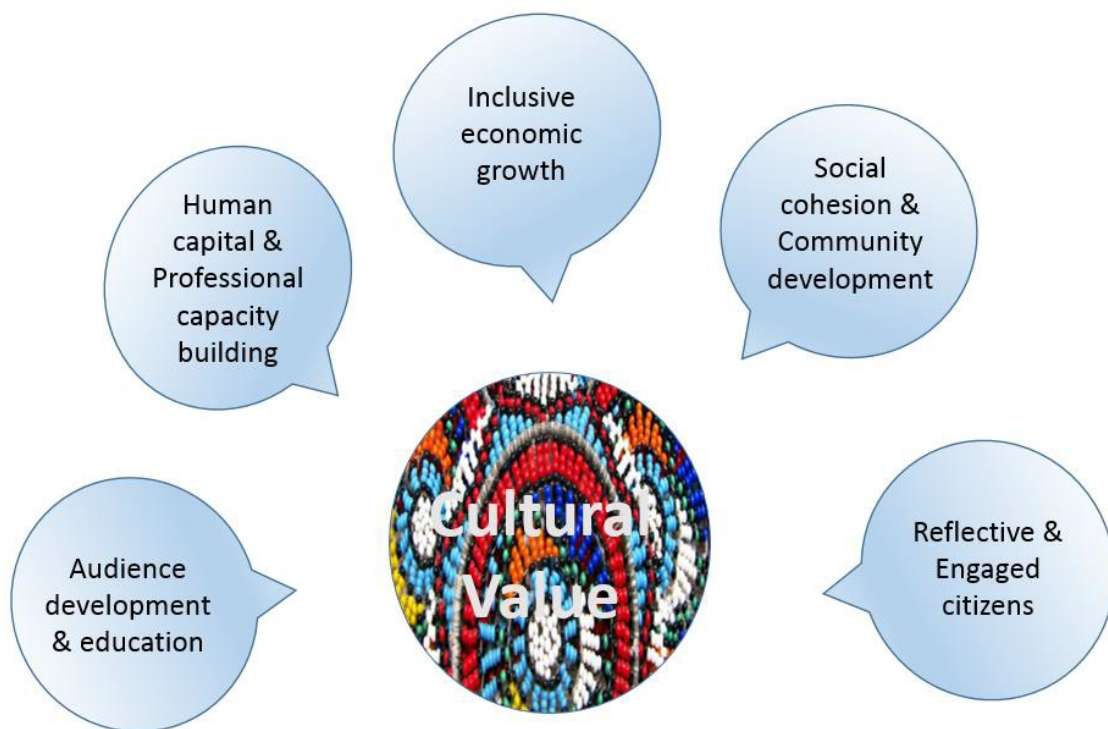
Department:  
Arts and Culture  
REPUBLIC OF SOUTH AFRICA

# Applying the Framework for the Monitoring and Evaluation of Publically Funded Arts, Culture and Heritage

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Monitoring and Evaluation can be important tools for both funders and arts practitioners in terms of demonstrating the value of the arts to communities and funders, accounting for the use of public funds, and designing policy interventions. The arts (broadly defined) result in three types of value: Economic (economic growth, employment, trade), Social (community development, social cohesion, inclusiveness) and Intrinsic (artistic quality, personal enlightenment, spiritual values).

This proposed M&E Framework identifies five cultural value themes and links them to indicators that could be used by arts organisations to demonstrate these kinds of value. For a full discussion of the development of the Framework, please see *A Framework for the Monitoring and Evaluation of Publically Funded Arts, Culture and Heritage* (South African Cultural Observatory, 2016). This report demonstrates how the Framework could be applied to a sample of projects funded under the Mzansi's Golden Economy (MGE) initiative.



## *The Five Cultural Value Themes*

In order to operationalise the Framework, the proposed themes need to be connected in indicators so that data or evidence about the impact of the specific project or organisation can be presented. The idea is not that every project should report on every theme, but that the Framework and indicators can provide a common “language” for arts professionals and funders, facilitating better communication, reporting and policy formulation. The following table suggests some indicators that could be used to demonstrate cultural value under the various themes.

The Mzansi’s Golden Economy (MGE) Guidelines: Criteria, Eligibility, Processes & Systems 2015/2016 – 2016/2017 version 1.0) funds arts, culture and heritage under three main categories, and a fourth category called “Miscellaneous”. The three categories are: Cultural Events (Annual Live Events for Young Artist; National Flagship Projects and Provincial Flagship Projects); Touring Ventures and Market Access (Digital and Social Media Platforms Domains; Touring Ventures: DAC Institutions); and Public Art Programmes.

The advantage of having a broad framework is that it can be adapted to reflect the specific aims of the different funding categories in MGE. Table 1 matches the specific objectives in the MGE Guidelines to the three most important value themes for this funding category.

**Table 1: Linking MGE Objectives to Value Themes**

<b>Funding category</b>	<b>Specific Objectives (MGE Guidelines, Section C)</b>	<b>Top 3 Framework Themes</b>
Cultural Events	<ul style="list-style-type: none"> <li>-To support diverse arts events which are geographically spread throughout a calendar period.</li> <li>-To develop and maintain arts audiences.</li> <li>-To support local economic development and job creation imperatives.</li> </ul>	<ul style="list-style-type: none"> <li>-Audience Development &amp; Education</li> <li>-Inclusive Economic Growth</li> <li>- Social Cohesion &amp; Community Development</li> </ul>
Touring Ventures	<ul style="list-style-type: none"> <li>-Showcase and promote to new audiences diverse South African based productions, exhibitions, designs and innovation related to the arts, culture and heritage sector.</li> <li>-To facilitate cultural products touring provincially, nationally and or internationally; to provide longer term employment opportunities for artists, audience development and to develop new markets.</li> </ul>	<ul style="list-style-type: none"> <li>-Audience Development &amp; Education</li> <li>-Inclusive Economic Growth</li> <li>-Human capital/Professional capacity building</li> </ul>
Public Art	<ul style="list-style-type: none"> <li>-To support diverse arts events which are geographically spread throughout a calendar period.</li> <li>-To develop and maintain arts audiences.</li> <li>-To support local economic development and job creation imperatives.</li> <li>-To beautify and promote the use of public space.</li> <li>-To promote involvement in the arts by the general public.</li> </ul>	<ul style="list-style-type: none"> <li>-Audience Development &amp; Education</li> <li>-Inclusive Economic Growth</li> <li>-Reflective &amp; Engaged citizens</li> </ul>

Depending on the project, indicators for other value themes may also be included, but the Framework could require that projects in a specific category report on at least some of the indicators aligned with the three most important value themes identified for their category. What is immediately apparent is that, in line with the repositioning of the new White Paper on Arts, Culture and Heritage currently under discussion, all categories are strongly linked to the Audience Development and Education and Inclusive Economic Growth themes.

However, the range of indicators used to demonstrate value within these broad themes (and their valuation methods) are adaptable enough to take into account the different foci and goals of each project. In addition, there is scope for different projects to foreground the indicators related to their most important outcomes. Table 2 links the five value themes to suggested indicators.

**Table 2: Linking Cultural Value Themes to Indicators**

Theme	Examples of indicators
<b>Audience Development &amp; Education</b>	Demographics (Age groups; Cultural/Race groups; Gender)
	Origins (Local/Visitor; Rural/Urban; Province; Nationality)
	Income and Education Groups
	Participation & time-use
	Ticket sales/participation (numbers)
	Media coverage (incl. value of)
	Local residents vs Visitors
	Strategies for attracting new audiences
	Workshops and arts appreciation
	Attendance at "new" kinds of ACH
	Appreciation of ACH
<b>Human Capital/Professional capacity building</b>	Training offered
	Experience gained
	Volunteers & Interns
	Impact on local SMMEs (established)
	Impact on event traders and hawkers
	Opportunities & partnerships with local artists
	Opportunities & partnerships with local stakeholders
	Opportunities for cultural entrepreneurs
	Development of artistic quality
	Showcasing South African art and artists
<b>Inclusive Economic Growth</b>	Organiser spending
	Earned income/Turnover
	Sponsorship (and sources)
	Audience spending
	Producer spending
	Media representative spending
	Length of stay (Bed nights)
	Tourist leverage (extended trips)
	Contribution to Gross Geographic Product/Gross value added
	Number and type of jobs created
	Sustainability (Organisation & Environmental)
<b>Social Cohesion &amp; Community Development</b>	Artist/Producer demographics (diversity)
	Artist/Producer origins (diversity)
	Audience diversity
	Cultural offerings (Local arts/heritage/languages)
	Audience motivation for attendance
	Audience & producer opinions
	Quality of Life & Wellbeing
	Trust
Inclusiveness	

	Marketing & Place identity
<b>Reflective &amp; Engaged Citizens</b>	Reflectiveness
	Empathy
	Appreciation of diversity
	Community engagement
	Transformative self-knowledge
	Fostering dialogue & strengthening democratic institutions

## Applying the Framework to MGE Projects: Cultural Events

In order to test the flexibility and applicability of the Framework, it was applied to some of the projects funded under the MGE initiative. The following section shows the results of the analysis of two very different projects, both in terms of size and objectives, with some discussion.

Table 3 shows the results for a project funded under the category “Cultural Events: Annual Live Events for Young Artists”. The project was designed primarily to benefit young people (up to 25 years) in an existing township dance group (60 people), staged by the **Udomo Entertainers**, based in Mamelodi. R30 000 DAC funding was received for a one day heritage month event in which the group presented modern and traditional dances to local audiences. Data used included organiser spending, the activities and beneficiaries, media coverage and a count of the audience.

**Table 3: Application of the M&E Framework to a Youth Dance Event: Udomo Entertainers**

Theme	Examples of indicators
<b>Audience Development &amp; Education</b>	✓ Ticket sales/participation (numbers): 300 people attended
	✓ Media coverage: Event reported in 1 local and 1 provincial newspaper
	✓ Local residents vs Visitors: Local
	✓ Appreciation of ACH: Traditional & modern dances showcased
<b>Human Capital/Professional capacity building</b>	✓ Training offered: Youth dance training (60 people)
	✓ Experience gained: Performance experience
	✓ Impact on local SMMEs (established): providers of catering, costumes and transport
	✓ Opportunities & partnerships with local artists: 3 local groups (41 artists) invited to perform
<b>Inclusive Economic Growth</b>	✓ Showcasing South African art and artists: Traditional Zulu dance forms
	✓ Organiser spending: R30 000
	✓ Sponsorship (and sources): DAC only
<b>Social Cohesion &amp; Community Development</b>	✓ Number and type of jobs created: 11 paid service providers
	✓ Cultural offerings (Local arts/heritage/languages): Zulu heritage (Dance, Music)
<b>Reflective &amp; Engaged Citizens</b>	✓ Quality of Life & Wellbeing: “protect”; “journey” of young dancers.
	✓ Community engagement: Developing young artists, supported by parents.

What the analysis shows is that the event, although unlikely to have a big economic impact, could still claim to have created value in a number of categories. A challenge in many of the reports is that, although some categories of value are claimed, they are not linked explicitly to indicators that can demonstrate this value. For example, even when organisers wrote eloquently of the importance of the event to the community in terms of developing young dancers and supporting and protecting them on their journey to adulthood, they did not include the opinions or words of the dancers themselves or their parents to provide evidence to support this claim. This would have been relatively easy to do (through, for example, a group discussion with the dancers and/or community after the event to ask them what it meant to them). Similarly, the characteristics of the service providers could have added to the claim that the event helped to stimulate the local economy.

The Framework was also applied to a provincial mixed arts festival (which included fine art, fashion, crafts and music) that happened over 3 days, and was funded under the “Cultural Events: Provincial Flagship” category (Table 4): **The Mpumalanga Comes Alive Festival (2015)**. The aims of the festival were to celebrate South African art and artists, especially from within the province in which it was held. The organisers are a registered non-profit organisation. They received funding of R2m from DAC (the largest sponsor) but also from a variety of other sponsors. Data was collected via an audience survey, organiser spending, documentary evidence on the characteristics of activities and beneficiaries and on the type and market value of media coverage.

**Table 4: Application of the M&E Framework to a Provincial Flagship Event: Mpumalanga Comes Alive Festival (2015).**

Theme	Examples of indicators
<b>Audience Development &amp; Education</b>	✓ Age groups: 76% 34 years or younger
	✓ Gender: 43% female
	✓ Origins: Percentages from SA provinces & other
	✓ Income and Education Groups: 81% degree/diploma; 61% earn monthly income of R10 000 or less.
	✓ Ticket sales/participation (numbers): 12 151 (ticket sales, complementary tickets, free events); main festival free
	✓ Media coverage (incl. value of): Value of media coverage R1.8m
	✓ Local residents vs Visitors: 67% from within the province
	✓ Strategies for attracting new audiences: (for future implementation): improve website; more publicity; group discounts; work with local press; improved signage and local marketing.
	✓ Attendance at "new" kinds of ACH: 28% of audience came because they “wanted to try something new”
<b>Human Capital/Professional capacity building</b>	✓ Experience gained: “formal and informal skills development opportunities”
	✓ Volunteers & Interns: 70 people
	✓ Impact on local SMMEs (established): 19 local companies benefitted financially
	✓ Opportunities & partnerships with local artists
	✓ Showcasing South African art and artists
<b>Inclusive Economic Growth</b>	✓ Earned income/Turnover: R2.6m (turnover); R46 000 (ticket sales – 1.75%)

	✓ Sponsorship (and sources): DAC; Lottery; Local businesses
	✓ Length of stay (Bed nights):58% 2 nights (R650 p/p, p/n); 1211 visitors; 61% occupancy rate.
	✓ Tourist leverage (extended trips): 31% from outside the province
	✓ Number and type of jobs created: 135 paid artists & service providers;
<b>Social Cohesion &amp; Community Development</b>	✓ Artist/Producer origins (diversity): 43% local artists (21/49)
	✓ Cultural offerings (Local arts/heritage/languages): wide variety offered in several languages and traditions.
	✓ Audience motivation for attendance: 60% “like the programme”; 40% “like the artists”; 28% “wanted to try something new” etc.
	✓ Marketing & Place identity: Value of media coverage R1.8m
<b>Reflective &amp; Engaged Citizens</b>	✓ Reflectiveness: Aim to “enhance awareness”
	✓ Appreciation of diversity: “encourage inclusiveness through...intercultural and hybrid performance activities”.

The festival could provide evidence for a wide variety of cultural value indicators, thus justifying its relatively large sponsorship from DAC. For example, an important stated goal of the event is to develop audiences and provide access to the arts, culture and heritage of the province. As a result of the sponsorship, they were able to offer shows on the main festival for free, which helped them to reach their goal of providing access. Although their turnover was R2.6 million, they only earned R46 000 from ticket sales as a result of offering so many free shows. The audience survey was also able to provide evidence for value claims related to audience social cohesion (opinion data showing that audiences appreciated the local artists who were showcased, and that at least some of them came to the festival to experience culture that was new to them). By reporting on planned strategies for attracting new audiences in the future, the event sets up goals that can be evaluated in the future.

Another example (Table 10) is the application of the Framework to two South African theatre productions invited to perform at a prestigious US festival. They received funding under the “Touring Ventures and Market Access” category. Sixteen performances were given, seen by 3000 people in the US. One show also presented at South African festivals to an audience of 3483. The total sponsorship received (from multiple donors, including DAC) was R833 334. Data was obtained from Audience numbers (ticket sales) and documentary evidence on activities.

### Concluding remarks

What the results of this analysis show is that events funded under the MGE initiative can be very different in terms of both what they are trying to achieve (aims and goals) and their funding. Which one was “better” from the point of view of DAC? The **Udomo Entertainers** received funding of R30,000 and benefited 300 people, so a “cost” of R100 per person. However, they contributed to DAC MGE goals in a number of ways and enabled an event that would otherwise probably not have happened at all. While economic (financial) impact is unlikely to have been large, social, non-market impacts were significant.

The **Mpumalanga Comes Alive Festival (2015)** received R2 million in sponsorship from DAC, and benefited an estimated 10 000 people, so a “cost” of R200 per person. The Festival reached a much wider range of people and artists and is likely to have had a much bigger economic impact, given the

number of tourists from outside the impact area that it attracts. The higher cost per person is thus justified.

What the analysis shows is that (i) using the same valuation methods and criteria for very different events is not appropriate; and (ii) that the Framework can be applied across a wide range of projects. However, evaluation is not costless, although there are different costs associated with different methods (Table 5).

**Table 5: Costs associated with Evaluation Methods**

Data Source	Types of information
<p><b>1. Own information</b></p> <p>Cost: Low</p>	<p>Financial records</p> <p>Ticket sales</p> <p>Spending</p> <p>Percentage of local service providers used &amp; their type (established firms, SMMEs etc)</p> <p>Jobs and volunteers</p> <p>Artist diversity and numbers</p> <p>Cultural offerings</p> <p>Meeting minutes</p> <p>Cooperation with local stakeholders (Reports on meetings; Training workshops etc.)</p>
<p><b>2. Observation</b></p> <p>Cost: Low to Medium</p>	<p>Audience counts</p> <p>Media reports</p> <p>Photographs</p> <p>Mentor documentation/other written progress reports</p>
<p><b>3. Surveys</b></p> <p>Cost: Medium to High</p>	<p>Audience surveys (spending, activities, opinions)</p> <p>Producer (artist) surveys</p> <p>Media representative surveys</p> <p>Service provider surveys</p>
<p><b>4. Analysis</b></p> <p>Cost: High</p>	<p>Economic impact on town/region/province</p> <p>Wider employment impact</p> <p>Non-market valuation methods</p> <p>Sustainability analysis</p>

For small events, such as the **Udomo Entertainers**, appropriate evaluation methods are likely to be related to tracking their own information, and from observation. As suggested, focus groups with some of young and their parents may also have helped to provide evidence for how important the event is to the community. For larger events, such as the **Mpumalanga Comes Alive Festival (2015)**, it was appropriate to use their own information, observation and surveys, which they did.

However, evaluation is not costless. Even collection and using own data has costs in terms of time and, if the expertise does not exist in the organisation, expertise. In order to track the impact of MGE projects more effectively, it may be worth considering:

- Showing the Framework to applications at the application stage and asking them to nominate which categories of value they think best describe the goals of their project;
- Requiring them to indicate, at the application stage, which kinds of information they will be using to provide evidence of this value;
- Making some funding available to cover the costs of the evaluation;
- Requiring the close-out report to link their nominated values with specific information to support their claims.