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Indicadores Estadísticos para Políticas de Arte

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La Federación Internacional de Consejos de Arte y Agencias Culturales (FICAAC) es la primera red global de entidades de financiación nacional de las artes. Inaugurado en Diciembre del 2000, nuestra misión es la de crear una fuente internacional y lugar de encuentro para todos aquellos cuya responsabilidad pública sea la de apoyar la excelencia y diversidad de la iniciativa artística.

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Prefacio

Alrededor del mundo se acrecientan las demandas sobre la responsabilidad de los dineros públicos. Las medidas de evaluaciones estadísticas han jugado un papel importante en cumplir dichas demandas. El campo de las políticas de las artes y culturales no son una excepción. Se ha realizado mucho trabajo para mejorar las políticas relacionadas con las estadísticas y los 'indicadores culturales'. Los indicadores estadísticos representan una parte integral de las herramientas utilizadas por los que toman las decisiones finales para comprender, evaluar y comunicar la importancia, y eficacia de sus políticas, y programas.

La necesidad de conseguir mejores estadísticas culturales y perfeccionar los indicadores estadísticos culturales ha resonado a través de las actividades de compartir información de la Federación Internacional de los Consejos de Arte y Agencias Culturales (FICAAC), y ha involucrado a la Federación en numerosos proyectos relacionados con estadísticas (apéndice 4). En Abril del 2004, durante su reunión en Washington DC, EE.UU., la junta directiva de la FICAAC discutió un informe preliminar sobre indicadores culturales redactado por la Secretaría, y consideró como la FICAAC puede enfocar sus propios esfuerzos en este tema. La junta directiva hizo énfasis en la importancia de los indicadores para aquellos que fomentan las artes en el mundo y acordaron la publicación de un Informe para discusión como una contribución al esfuerzo global para desarrollar indicadores estadísticos más robustos para la monitorización y evaluación de las políticas de arte.

El informe para discusión (en inglés) fue distribuido en nuestro boletín quincenal de noticias ACORNS, en Julio del 2004. Tras su distribución hemos recibido comentarios, opiniones y consejos de una variedad de fuentes, incluyendo investigadores y analistas en este campo, así como miembros de la directiva de la FICAAC que participaron en una reunión de investigadores en Montreal, Canadá, en agosto del 2004. Este informe D'Art incorpora comentarios y avances de estas fuentes.

Durante su reunión en Londres en Abril de 2005, la junta directiva de la FICAAC estuvo de acuerdo en que es necesario continuar el trabajo sobre el desarrollo de indicadores. Para este fin, nos aseguraremos que los indicadores sean discutidos en las reuniones futuras de los investigadores de la FICAAC, con el fin de abrir nuevos caminos, así como para proponer indicadores que permitan ser adoptados y probados por los consejos de las artes y ministerios de cultura.

Al traducir al Español la parte principal del Informe buscamos ampliar la discusión internacional sobre este importante tópico en las políticas sobre las artes.

Quiero agradecer al autor de este Informe, Christopher Madden, y todos aquellos que han aportado su experiencia (incluyendo nuestra traductora Shamy Perea). Puestas al día relacionadas con el trabajo de la FICAAC seguirán siendo anunciadas en ACORNS. Si tienen algún comentario sobre esta investigación, o desean mantenerse informados del trabajo de la FICAAC sobre indicadores, pónganse en contacto con nosotros a través de Info@ifacca.org.

Sarah Gardner

Directora Ejecutiva

Introducción:

Este informe D'Art ha sido preparado en base a un documento discutido y dado a conocer en Julio del 2004. El informe pone al día e incorpora comentarios actualizados sobre el informe discutido. En el apéndice 5, aparece una lista de las personas que han proporcionado comentarios y actualizado el informe discutido.

El informe adopta una visión global del trabajo desarrollado sobre indicadores culturales, realizando temas con amplitud analítica para coordinar y resumir las ideas que IFACCA ha recibido para acelerar el desarrollo del trabajo futuro.

En el apéndice 2, encontrarán una breve revisión de la literatura relacionada con los indicadores culturales. Las referencias utilizadas para la revisión se incluyen en una bibliografía.

Los objetivos del informe son:

- identificar los trabajos actuales realizados para desarrollar los indicadores culturales;
- explorar decisiones en el desarrollo futuro de indicadores culturales;
- proporcionar una introducción a la literatura sobre indicadores culturales cuantitativos;
- deducir algunas recomendaciones de buenas practicas encontradas en la literatura;
- proporcionar una lista de referencias útiles sobre los indicadores culturales.

Aunque aparecen algunas referencias en español y francés, el Informe se concentra principalmente en fuentes de lengua inglesa. Como de costumbre, damos la bienvenida a comentarios, sugerencias y referencias adicionales en cualquier otro lenguaje.

Recursos y globales actuales y actividad en indicadores culturales

Existe un sano nivel en el trabajo de desarrollo, investigación y comentarios sobre los indicadores culturales. Esta actividad forma parte de un esfuerzo para mejorar los indicadores 'sociales' de forma más generalizada, como respuesta a una expansiva aspiración entre gobernantes y científicos sociales para desarrollar mejores medidas de progreso con el fin de conseguir una mayor responsabilidad en las políticas y programas gubernamentales. Se está llevando a cabo un trabajo substancial en las ciencias sociales y análisis de políticas para desarrollar indicadores de progreso, indicadores sociales, indicadores de desarrollo, e indicadores para políticas específicas en áreas tales como la salud, vivienda, y educación. Aunque estos trabajos no se resumirán aquí (algunas lecciones sobre el movimiento "indicadores sociales" serán discutidas), es conveniente resaltar que el interés en el desarrollo de indicadores culturales forma parte de un movimiento generalizado en las políticas públicas para desarrollar mejores indicadores.

Literatura sobre indicadores culturales

La bibliografía para este informe contiene una lista de referencias sobre indicadores culturales y temas relacionados. Esto es solamente una selección de una amplia literatura, la lista puede fácilmente incrementarse incluyendo fuentes específicas de un

mayor número de países, así como fuentes en otras lenguas. Como sugieren las referencias de este informe en español y las que aparecen en Bonet (2004), añadiendo solamente las referencias en español el volumen de las referencias en la bibliografía aumentarían significativamente. También son numerosas las fuentes sobre indicadores culturales en lengua francesa, especialmente como resultado de los programas a largo plazo desarrollados por el Ministerio Francés de Cultura y Comunicaciones (véase, por ejemplo, su descripción en Schuster, 2002b) los trabajos presentados en el Simposio Internacional de Estadísticas Culturales, Montreal, Octubre 2002, que también están disponibles en francés (Le papiers qui on été présentés au colloque international sur les stadistiques culturelles, Montreal 2002, sont disponibles en francais:

http://www.colloque2002symposium.gouv.qc.ca/h4v_page_accueil_fr.htm).

Las Fuentes de la bibliografía han sido utilizadas para desarrollar una visión global sobre indicadores culturales en el apéndice 2.

Seminarios internacionales sobre indicadores culturales

Recientemente, se han llevado a cabo un número significativo de reuniones internacionales sobre estadísticas e indicadores culturales:

- *Taking the Measure of Culture, 'Midiendo la Cultura'* Princeton University, New Jersey, June 7-8, 2002, <http://www.princeton.edu/culturalpolicy/moc.html>
- *International Symposium on Culture Statistics 'Simposio Internacional sobre Estadísticas Culturales'*, Montreal, October 2002 http://www.colloque2002symposium.gouv.qc.ca/h4v_page_accueil_an.htm.
- UNESCO/CONACULTA *International Seminar on Cultural Indicators 'Seminario Internacional sobre Indicadores Culturales'*, Centro Nacional de las Artes, Mexico, DF, Mexico, 7-9 May 2003, <http://sic.conaculta.gob.mx/seminario/menu.html>
- *Experts' meeting on cultural indicators 'Reunión de Expertos sobre Indicadores Culturales'*, Interarts, Barcelona, 20-21 November 2003.
- *International Seminar on Cultural Indicators of Human Development in Africa 'Seminario Internacional sobre Indicadores Culturales de Desarrollo Humano en Africa'*, Maputo, Mozambique, 2-5 March, 2004, organised by Interarts, UNESCO, and OCPA (Baltà, 2004).

Indicadores y estadísticas culturales también han sido incluidas en la agenda de conferencias de mayor envergadura, tales como:

- *Congress on Cultural Rights and Human Development 'Congreso sobre Derechos Culturales y Desarrollo Humano* para el Foro Universal de Culturas de Barcelona los días 23 – 27 de agosto de 2004' (http://www.interarts.net/eng/2.3.1_cooperacio_item.php?cooperationId=7).
- *Third International Conference on Cultural Policy Research 'Tercer Conferencia Internacional sobre Investigación de Políticas Culturales'*, Montréal Agosto 2004, formó parte de la agenda sobre indicadores culturales (<http://www.hec.ca/iccpr/program.html>)
- *Transformations: Culture and the Environment in Human Development*, 'Transformaciones: Cultura y Medio Ambiente en el Desarrollo Humano, 7-9 de febrero de 2005, Canberra, Australia (<http://www.fecca.org.au/transformations/>); el tercer día se realizó un trabajo sobre indicadores culturales

- *Third Global Forum on Human Development 'El Tercer Foro Global sobre Desarrollo Humano*, 17 – 19 de enero en París, (<http://hdr.undp.org/events/forum2005/>); taller de trabajo sobre definición y medida de la exclusión cultural.

Trabajos en curso sobre indicadores culturales

Tanto agencias como individuos trabajan actualmente en varios países para mejorar los indicadores culturales. El Apéndice 1 contiene una lista de éstos, controlados por la Secretaría de la FICAAC. Dichos países incluyen Canadá, Nueva Zelanda, Bélgica, China (Hong Kong), Inglaterra, España, México, Colombia, así como proyectos internacionales en el Pacífico, los Estados Unidos, y a través de la UNESCO el Instituto de Estadísticas de Canadá. Esto no es, desde luego, un informe exhaustivo y por tanto la FICAAC invita a cualquier otra persona que estén trabajando sobre indicadores para que se pongan en contacto con nosotros a través de info@ifacca.org.

Áreas de trabajo afines

Existen otras afinidades de trabajo e investigación que se relacionan e influyen en la agenda de los indicadores culturales. Exponemos a continuación aquellas de particular importancia:

1) Impacto social de las artes

Existe trabajo continuo para mejor comprender los efectos varios – o impactos – de la arte y las actividades artísticas. La investigación en estos sectores puede hacerse bajo una amplia variedad de temas: impactos sociales, efectos sociales, valor, beneficios, participación, cohesión social, capital social, exclusión o inclusión social, desarrollo comunitario, calidad de vida, y bienestar. Hay dos situaciones principales perceptibles en esta investigación. Algunas abordan los temas “cabeza abajo” explorando los impactos sociales de las artes, en las que “social” significa impactos “no económicos”, o impactos relacionados con políticas sociales. Otras, y particularmente en los Estados Unidos, aborda los efectos de “abajo arriba”, al explorar las motivaciones individuales y experiencias en su participación en las artes, evaluando los impactos particulares de los programas de las artes. Indiferentemente del enfoque adoptado, a medida de que nuestra comprensión de cómo las actividades de las artes se desarrollan, igualmente lo hacen las medidas (indicadores) por medio de los cuales tratamos de monitorizar y evaluar aquellas actividades.¹

2) Programas de estadísticas culturales

Trabajo para mejorar los datos estadísticas culturales, particularmente la estandarización internacional de las estadísticas culturales, altera la estructura de los datos, así como el marco estadístico que conforman el fundamento de los indicadores culturales: por ejemplo, los programas estadísticos culturales de la UNESCO (Lievesley, 2001 y 2002) y Eurostat (Comisión Europea, 2000). Véase también la FICAAC (2002 y 2004), DCMS (2004), Glade (2003), Schuster (2002a) y Mannimen (2002).

¹ Referencias seleccionadas: AEGIS (forthcoming), Oakley (2004), Arts Council England (2004), Balfe (2003), Canadian Journal of Communication (2002), Ellis (2003), Evans & Shaw (2004), Geursen & Rentschler (2003), Guetzkow (2002), Jackson et al (2003), Jeannotte (2000), Jermyn (2001), McCarthy & Jinnat (2001), McCarthy et al (2001), Matarasso (1996, 1997, 2001, 2003), Merli (2002), Reeves (2002), Robinson (2003), Ruiz (2004), Selwood (2003), Outspan Group (1999), Walker et al (2002), Williams (1996).

3) Teoría general de los indicadores

Los métodos para los indicadores culturales se verán claramente influidos por el desarrollo de la teoría de los indicadores estadísticos. Igualmente serán influenciados por los desarrollos en los métodos para indicadores utilizados en otras esferas de políticas, tales como social, económica, calidad de vida y bienestar, muchos de los cuales contienen un elemento cultural. Ejemplos de ello son los indicadores estadísticos utilizados por el World Bank (<http://www.worldbank.org/data/wdi2004/index.htm>) y las Naciones Unidas (<http://unstats.un.org/unsd/demographic/social/default.htm>), así como generalmente en el movimiento de los indicadores sociales.²

Otros ramales de la literatura que son apropiados para la producción y utilización de los indicadores culturales, y que han sido utilizados en esta revisión, son: metodología para la evaluación (por ejemplo, Callahan, 2005; DeVita, 2005; Gilhespy, 2005; York, 2003; Keating, 2002; Mott, 2003; Wyszomirsky, 1998; Chelinsky y Shadish, 1997); así como temas referentes a políticas basadas en evidencias (por ejemplo, Edwards, 2004; Tenbelsen, 2004; Sanderson, 2002; Black, 2001; Sherman, 2003; Spring., 1997).

Asuntos claves

En su sobresaliente trabajo, Gouiedo (1993) sugiere que la literatura sobre indicadores culturales puede encontrarse desde principios de 1970. Desde entonces el desarrollo de los indicadores culturales ha constituido una parte importante de la política de investigación, con el resultado de que el pensamiento sobre indicadores culturales está actualmente bien desarrollado, a pesar de que los indicadores culturales no sean utilizados universalmente en las políticas culturales. Tal y como indica la revisión en el apéndice 2, la literatura sobre indicadores culturales incita a una variedad de temas analíticos y teóricos. Pero también aporta temas sobre como mejorar el desarrollo de los trabajos. Algunos de los puntos fundamentales en la revisión de la literatura son los resaltados más abajo.

1. Temas analíticos

Se ha expresado alguna desconfianza sobre la calidad de los indicadores culturales y estadísticas culturales actuales, y en particular su idoneidad en las políticas y programas actuales. Mataraso (2001; 2) señala que ‘que la mayoría de los trabajos actuales sobre indicadores [culturales] son notables por lo que no dicen’ y que ‘el eslabón perdido es... lo que se supone que deben medir’. La revisión de marcos de indicadores culturales existentes llevado a cabo por el Ministerio de Cultura y Patrimonio (sin publicar) no reconoce un marco ‘utilizable’.

El problema es difícilmente confinado a la cultura. La mayoría de los sistemas de indicadores comunitarios, según Sawicki (2002; 13-14) ‘están mal enfocados, repletos de expectativas poco realistas, pobremente diseñados y desarrollados, y predestinados a ser ignorados’ Innes y Booher (2000; 6) encuentran que ‘millones de dólares y mucho tiempo se desperdicia por parte de mucha gente con talento en la preparación de informes sobre indicadores que permanecen en estantes acumulando polvo’. Incluso comentaristas menos escépticos admiten sus limitaciones prácticas. Noll (2002; 28), por ejemplo, sugiere que a pesar de que los indicadores sociales han sido utilizados con buenos resultados como herramientas monitorizadas descriptivas ‘su aplicación y

2 Para una selección limitada ver Dhakal y Imura (2003), Sawicki (2002), Noll (2002), de Haan et al (2002), Gobierno Belga (2001), Innes y Booher (2000), Berger-Schmitt (1999), Sharpe (1999), Gasteyer y Flora (1999), Cobb y Rixford (1998), y Brown y Corbett, 1997.

utilización para fijar objetivos y prioridades, o la elección y evaluación de programas políticos, todavía parecen ser problemáticos y dudosos’.

Los indicadores culturales, así como los sociales, se encuentran todavía en una amplia fase de desarrollo, particularmente en cuanto a su relevancia en la toma de decisiones y su capacidad programática. Existen por tanto razones para la cautela en relación con los marcos de indicadores culturales que han sido desarrollados hasta la fecha. Los problemas analíticos más comunes incluyen:

Confusión sobre que son los indicadores y como deben ser utilizados. Los que se dedican a desarrollar indicadores culturales raramente dedican tiempo suficiente para explorar la teoría relativa a los indicadores, o articular con claridad la relación recíproca entre indicadores, datos y estadísticas, así como entre indicadores, política de evaluación y los análisis culturales. El Ministerio de Cultura y Patrimonio (sin publicar) por ejemplo, ha encontrado confusiones en la literatura sobre indicadores culturales en relación con las diferencias entre una estadística y un indicador. Duxbury (2003; 9) encuentra una ‘conflación’ entre indicadores y estadísticas.

Falta de datos cualitativos. La calidad de los indicadores depende de su calidad – e incluso de la existencia – de datos subyacentes. La necesidad de mejores datos culturales es un ‘grito de atención’ muy familiar entre los analistas de políticas culturales, aunque otros han sugerido que el problema reside menos en la falta de datos que en el uso apropiado de los datos existentes (ver la revisión en FICACC, 2004)

Los marcos son poco manejables. Muchos de los marcos de indicadores culturales que han sido desarrollados consisten en ‘listas de deseos’ conteniendo un amplio número y gran variedad de indicadores propuestos: muchos son matrices que integran diferentes enfoques de las políticas, variables estadísticas y fases en la ‘cadena de valores’ culturales (ver por ejemplo Gouiedo, 1993, que contiene 70 propuestas de indicadores culturales). Estos grandes marcos matrices son difíciles de adaptar como propósitos de políticas específicas, ya que el número completo de indicadores impide el desarrollo de uno cualquiera a un nivel operativo. El gran número de indicadores potenciales restringe las pruebas sobre la eficacia de indicadores particulares y obstaculiza una más detallada consideración sobre como los indicadores específicos pueden transmitir políticas, o lo que los cambios en cualquier indicador realmente significan. Estos complejos resultados muy a menudo sobrepasan la escala, presupuesto y cronograma de tiempo de un proyecto típico sobre indicadores culturales. Sin embargo, Cob y Rixford (1988; 18) sugieren ‘que una limitada cantidad de indicadores es más poderosa que una lista de lavandería’.

La necesidad de concentrar el desarrollo de indicadores en un número limitado de indicadores claves fue un importante tema de discusión tanto a nivel de la junta directiva de la IFACCA, como en la reunión de investigadores de la IFACCA en Montreal en Agosto del 2004 (resumido en el apéndice 4).

Los objetivos de las políticas son imprecisos. Los objetivos de las políticas culturales tienden a yacer bajo una vasta nomenclatura, abstracta, e incluso con una terminología imprecisa. Algunos analistas lo reducen considerándolo como una ‘teoría con bases débiles’ en las políticas culturales (Baeker, 2002). Hugoson (1997), sin embargo, argumenta que tal abstracción es una condición *necesaria* para las políticas culturales.

Cualquiera que sea la razón, abstracción o imprecisión en políticas culturales siempre dificultará el desarrollo de indicadores de políticas claras.

2. Asuntos de Coordinación

Parece haber pocos contactos entre agencias que están actualmente desarrollando indicadores culturales. Dos problemas clave que podrían ser mitigados por una mejor comunicación y coordinación son:

Multiplicidad del trabajo. El trabajo de desarrollo se replica por todo el mundo. Por ejemplo, se repite la revisión de literatura y se desarrollan marcos teóricos similares. Esto representa una duplicación de los gastos en la investigación de políticas culturales, que podría reducirse con una mejora de la comunicación entre investigadores.

Diferencias de enfoque. Aunque haya amplias similitudes en las políticas culturales desarrolladas individualmente, diferentes investigadores de indicadores adoptan enfoques, marcos y desarrollan indicadores ligeramente distintos. Mientras que es apropiado que los distintos países tengan diferentes prioridades de indicadores, puesto que tienen diferentes prioridades en las políticas culturales, una mejora de la coordinación y comunicación puede representar soluciones para los problemas comunes o ‘genéricos’. El posible resultado sería doble: la agenda de investigación sobre indicadores culturales se aceleraría; y se podría promover la estandarización del núcleo principal de los indicadores culturales.

Informes recientes han exigido una mayor coordinación en la investigación de políticas culturales y recopilación de datos (por ejemplo, Schuster, 2002b; y Kleberg, 2003). El trabajo sobre indicadores culturales es un ejemplo a la mano de los beneficios que pueden lograrse con un enfoque más preciso en una coordinación entre naciones. La economía que puede conseguirse en la agenda de investigación de políticas culturales son substanciales, ya que es muy probable que los indicadores estadísticos se aplicarán cada vez más a la evaluación y monitorización de las políticas culturales.

¿Qué hace un buen indicador?

La revisión de la literatura en el apéndice 2 documenta puntos de vista y opiniones registrados en la literatura sobre que son los indicadores culturales, como se utilizan, y la buena práctica en el diseño y desarrollo de indicadores culturales. Un número de comentaristas proporcionan listas para verificar y comprobar los atributos de un buen indicador. La figura 1 resume y clasifica los principales atributos de acuerdo con el número de veces que aparecen en la literatura consultada. Los atributos no son necesariamente mutuamente exclusivos, y algunos han sido realizados agrupados e interpretados rudimentariamente. Como resultado, la lista no debe ser considerada como una encuesta de opiniones científicas, pero sí proporciona un rápido resumen de recomendaciones realizadas por investigadores de los indicadores, y la clasificación puede ser interesante puesto que realza las prioridades percibidas por los mismos.

Figure 1: Attributes of a good indicator

Attribute	No. of citations
Grounded in theory	9
Relevant (serve a practical or valued purpose)	6
Grounded in and/or linked to policy practice	5
Comparable across regions	5
Comparable across time periods	5
Measurable (able to be measured, and data available)	4
Easily understood	4
Unambiguous/clear	4
Able to be disaggregated by population subgroups	4
Consistent with purpose	4
Timely (up-to-date)	3
Measurable over time	3
Universal	2
Able to be benchmarked	2
Contextualised (presented with additional contextual information)	2
Revisable	2
Methodologically defensible ('valid')	2
Reliable	1
Sensitive to cultural diversity	1
Realistic	1
Capture the essence of an issue	1
Designed through consultation	1
Trusted	1

Sources: Belgian Government (2001), Brown and Corbett (1997), Chapman (2000;1), Cobb and Rixford (1998), Duxbury (2003; 8-9), Fukuda-Parr (2001; 2-3), Innes and Booher (2000), Lievesley (2001; 377), Mercer (2004), Morton (1996; 120), Pfenniger (2004; 4), Pignataro (2003), Sawicki (2002; 25), Schuster (2001; 15), Sharpe (1999; 44), UNRISD and UNESCO (1997; 8).

¿Cómo desarrollar indicadores?

La revisión de la literatura en el apéndice 2 también resalta que por lo menos hay cinco diferentes etapas en el desarrollo de indicadores:

1. Conceptual-consideración de los fundamentos teóricos y contexto institucional de los indicadores propuestos.
2. Selección-exploración de indicadores posibles y delineación de las claves de los indicadores.
3. Definición-definición de los indicadores elegidos en (2).
4. Colección-colección de datos y número de los indicadores.
5. Gestión continua y evaluación-implementar un sistema de dirección para reunir los datos continuamente con el fin de evaluar y reevaluar el sistema de indicadores dentro de la política o ciclo del programa.

Las etapas 1,2 y 3 se detallan más abajo. Se consideran relativamente etapas patrón en el proceso del desarrollo de indicadores. Las etapas 4 y 5 dependen de los propósitos y arreglos institucionales asociados con los proyectos sobre indicadores particulares y por tanto no serán explorados en detalle aquí.

1. Conceptualización

Para estimular la claridad sobre la base de los conceptos, los comentaristas hacen las siguientes sugerencias y preguntas:

- * ¿Por qué se han desarrollado los indicadores? ¿Cuáles son los propósitos y objetivos de los indicadores?
- * ¿Por qué se necesitan los indicadores?
- * ¿Cuál es la realidad que miden? Alerta con la “inflación” de los indicadores con esa realidad, a veces engañosa.
- * ¿Que armazón conceptual, procesos administrativos, y realidades gubernamentales deben ser considerados?
- * Los indicadores deben estar firmemente relacionados o encajados en un entramado o estrategia por la cual ganan sentido y valor, y deben ser integrados para compartir un valor común plausible con otros valores programáticos. Similarmente, la literatura ilustra la importancia de anticipar como serán recibidos los indicadores, así como considerar las implicaciones estratégicas del desarrollo de indicadores:
- * ¿Cómo deberán ser interpretados los indicadores?
- * ¿Cómo los interpretarán otros?
- * ¿Cómo serán utilizados, o mal utilizados por otros?
- * ¿Cómo pueden los indicadores influir sobre el comportamiento?
- * ¿Cómo puede el acto de la valoración influir en los comportamientos?

2. Selección

La selección de los mejores indicadores puede considerarse en dos partes, Primero, determinar que factores son importantes en el proceso de selección:

- ¿Cómo se deben elegir los indicadores?
- ¿Lo que se trata de medir puede ser reducido en dimensiones significativas?
- ¿Qué nivel de información puede ser recolectada de forma útil y sostenible?
- ¿Qué es importante medir?

Segundo. Considerar posibles variables y medidas:

- ¿Qué tipos de indicadores buscamos?
- ¿Las variables pueden ser medidas?
- ¿Si una variable no puede medirse, existen substituciones idóneas? Si no, reconocer que solo se pueden desarrollar indicadores parciales.
- ¿Un indicador es realmente un indicador, o solamente una estadística?
- ¿Los indicadores no tienen un valor cero. ¿Que valores subyacen en los indicadores?
- ¿Qué simbolizan los indicadores? El valor simbólico de un indicador puede exceder su valor como una medida literal.
- ¿Un “índice compuesto” (un indicador que implica medir un índice de ejecución total) es deseable, o indicadores múltiples que reflejen varios aspectos del fenómeno que trata de medirse? ¿Si se elige un índice compuesto, cual debe ser la metodología para su agregación y preponderancia?
- ¿Qué es lo que los indicadores miden, contribución, rendimiento, o resultado? Asegúrense de poner el énfasis apropiado en los resultados. Busquen indicadores que revelen causas, no síntomas.

3. Definición y descripción de los indicadores

La tabla 2 contiene un mínimo ajustado de propuestas de campos necesarios para la construcción, interpretación y presentación de un indicador, con una descripción breve de cada campo de trabajo. El apéndice 3 proporciona una indicación de cómo los campos pueden ser aplicables a la participación como valor fijo en las artes, un indicador que se encuentra comúnmente en la política cultural.

Tabla 2: Desarrollo de campos para indicadores

Campo de indicadore	Descripción
Objetivo	El resultado u objetivo del indicador, como definido por la política que ofrece su significado o valor
Medida	Nombre sucinto, o etiqueta para el indicador
Significado	Una descripción de cómo el indicador precisa el objetivo
Definición	Una definición de la variable estadística
Información Técnica	El meollo fundamental (metodologías, estudio de los instrumentos) que apuntalan los indicadores (incluyendo los datos fundamentales por si es necesaria la comparación con las variables)
Contexto comparativo	La información comparativa utilizada para darle significado a los indicadores
Dirección	Describe el significado de cambios/diferencias en los indicadores.
Sensibilidad	Define si las alteraciones cambio/diferencia son significativas
Influencias externas	Las influencias externas, o “exógenas” que puedan ocasionar un cambio/diferencia en el indicador (incluyendo, cuando posible, datos sobre el factor exógeno y un análisis de su impacto en el indicador)
Estructura	Análisis de cualquier sub-componente interesante de los indicadores. Análisis de las variables por sub-población
Temas y limitaciones	Descripción de las limitaciones del indicador al medir su objetivo/resultado. Descripción de lo que no mide el indicador
Presentación de datos	Presentación de los datos en formato claro, con el núcleo fundamental, suposición y notificación cautelar
Interpretación	¿Que dice el indicador?

Resumen

El desarrollo de indicadores culturales confiables, oportunos y robustos es esencial para formular políticas de las artes eficaces, así como capaces de consolidar la posición de las agencias que apoyan las artes ante la mayor responsabilidad hacia los gobiernos y los pueblos. Este informe para discusión sugiere que a pesar de la larga historia de la teoría y comentarios sobre los indicadores culturales, la implementación práctica de éstos en la política de las artes permanece siendo desigual. Esto es cierto tanto en los países desarrollados, donde hay un estable suministro de datos culturales, como en los países en desarrollo donde los datos son más bien escasos.

Este informe D'Art proporciona antecedentes sobre la situación actualizada de los indicadores culturales- La revisión de la literatura sobre indicadores culturales incrementa el número de soluciones para el desarrollo futuro del trabajo:

- Superior claridad sobre la naturaleza de las actividades artísticas (porque el público emprende actividades artísticas y sus beneficios públicos y privados)
- Superior claridad en la articulación de objetivos para políticas culturales y para poder determinar los indicadores apropiados para medir resultados contra objetivos.
- Superiores metas estratégicas para el trabajo de desarrollo sobre indicadores culturales, especialmente, la prioridad de un limitado número de indicadores.
- Superior comunicación- e incluso coordinación- entre investigadores y líderes involucrados en el desarrollo de indicadores.

Las contestaciones recibidas sobre el informe para discusión enviaron una cantidad de ideas para conseguir mejor coordinación y desarrollo de los indicadores culturales:

- Organización de un Foro informático para las personas que trabajan en indicadores.
- Reunir los entramados (framework) e indicadores de varias organizaciones con redes informáticas.
- Desarrollar “FAQs” relacionadas con el desarrollo de indicadores, y el desarrollo de entramados para indicadores.
- Una base de datos de indicadores informatizada: incluyendo, para cada indicador, una tarjeta índice que contenga la definición de los datos, unidad de medición, fuente de los datos etc.
- Seminarios sobre estadísticas culturales, particularmente para los países en vía de desarrollo.

Agradeceremos cualquiera otras ideas en info@ifacca.org.

Appendix 1: Agencies and individuals working on cultural indicators

NB: this table lists work being undertaken of which IFACCA is aware. The focus is also on work that relates to arts policy. Broader work that has cultural components, such as social, community, and creative industries indicators, may not be included.

Country/region	Agency	Notes and references
International	UNESCO Institute of Statistics	Lievesley (2002)
Africa	OCPA, Interarts and UNESCO	Propose establishing a task force to draft matrix of cultural indicators of human development. (OCPA, 2005; OCPA, Interarts and UNESCO, 2004)
Argentina	Instituto de Políticas Culturales de la Universidad Nacional de Tres de Febrero	
Australia	Queensland (state) government	Reviewing its indicators for the arts portfolio
Belgium, Flanders	Culture policy centre (Re-creatief Vlaanderen), University of Ghent, researcher Frank Stroobandt.	Published and unpublished materials in Dutch.
Belgium	Robert Palmer and Charles Landry	Focussed on cities
Canada	Department of Canadian Heritage, Statistics Canada (statistics framework) and Observatoire culturel du Quebec	Stanley (2002), others unpublished.
Chile	Consejo Nacional de la Cultural y las Artes	
China, Hong Kong	International Intelligence on Culture for Hong Kong Arts Development Council	
Colombia	Ministry of Culture, Colombia	
England	Arts Council England	Ongoing indicator development work, including local performance indicators (Audit Commission et al, 2003)
	Department for Culture, Media and Sport (DCMS)	DCMS (2002a; 2004)
Europe	European Commission, Eurostat LEG	European Commission (2000)

Country/region	Agency	Notes and references
Europe	Eurocult21 (network focussing on cultural issues of cities)	Eurocult21 on indicators will focus on cultural participation http://www.eurocult21.org/ .
Europe	Council of Europe and ERICArts, with Canadian Cultural Observatory	As part of the Compendium project, developing indicators on: cultural diversity, social cohesion, inter-cultural dialogue and prices for cultural goods and services.
Mexico	Fondo Nacional para la Cultura y las Artes (CONACULTA)	Held a seminar on cultural indicators (URL in paper text). Information is in Spanish.
Mexico	Mexico City Ministry of Culture	Email contact with IFACCA
New Zealand	Ministry for Culture and Heritage and Statistics NZ	Aiming to develop comprehensive set of indicators for monitoring and evaluation of NZ's cultural sector. IFACCA involved in an advisory capacity.
Pacific	Secretariat of the Pacific Community	CulturalMARC and McDermott Miller (2004)
Scotland	Centre for Cultural Policy Research, University of Glasgow	The Centre has an ongoing project aiming to improve cultural data in Scotland.
Slovenia	Ministry for Culture and Statistical Office of Republic of Slovenia	Establishing a system of statistical for the needs of the Ministry for Culture
Spain	Interarts	Baltà (2004)
USA	Americans for the Arts	Looking to develop a 'national arts index measuring the cultural health and vitality of the arts' (Americans for the Arts, 2004; 3)
USA	The Urban Institute	Arts and culture indicators in community building project: www.urban.org/nnip/acip.html
USA	Helmut Anheier, UCLA School of Public Policy and Social Research, with Raj Isar, American University Paris.	Have proposed a 'World Cultures Report' containing cultural indicators. Anheier (2004)
Venezuela	Observatorio de Politicas Culturales Innovarium	

Appendix 2: Cultural indicators – review of current literature

This appendix sets out some general issues taken from a brief review of the literature on cultural indicators. The following topics are explored:

- What are cultural indicators?
- Relationships between data, indicators, and analysis/evaluation
 - Data, statistics and indicators
 - Indicators and analysis/evaluation
- What are cultural indicators used for?
- Use of indicators by arts support agencies
- Types of indicators
- Culture or arts indicators?
- What makes a good indicator?
- Prioritising indicators
- How to develop indicators
- Lessons learned from the history of social indicators
- Cultural indicators: examples

What are cultural indicators?

It is not easy to define what an ‘indicator’ is in simple terms. Some conceptual elements are set out here, and a practical example is described at the end of the appendix.

Indicators may be *quantitative* as well as *qualitative*. Quantitative indicators are statistical measures based on ‘numerical or statistical facts’ (Chapman, 2000; 2). Qualitative indicators are language-based descriptions of cultural phenomenon. This review concentrates on quantitative indicators only. This does not mean to imply that qualitative indicators are inferior or less useful in arts policy. Indeed, qualitative indicators may be *more* effective at making sense of, or communicating the outcomes of, arts and cultural policies.

An indicator is generally portrayed as special type of statistic; it is a statistic with ‘higher meaning’. Whereas a statistic *describes* a phenomenon, an indicator *implies* something about that phenomenon:

Indicators...must contain evaluative, and not only descriptive, information.
(Fukuda-Parr, 2001; 278).

Distinguishing an indicator from a statistic is, however, not always easy, as the definition in Glade (2003) suggests:

What an indicator indicates, so to speak, is generally a measurement that, taken in relation to other variables, facilitates comparative study of the behavior of one or more variables, either cross-sectionally or longitudinally (or both). In relation to other variables, taken singly or in compound form, it can also be used to profile a system’s structure and analyze its performance... Alternatively, an indicator can be incorporated, along with one or more other variables, into a model for stochastic purposes as in the macroeconomic analytical use of leading, lagging, and coincident indicators to forecast aggregate levels of business activity. In this latter connection, which has distinct implications for the cultural-indicator enterprise, the indicators become a basis for policy formation.’
(Glade 2003)

In short, a generally accepted yardstick is that quantitative indicators are statistics that can be used to make sense of, monitor, or evaluate some phenomenon:

An indicator is an instrument or tool for evaluation, a yardstick to measure results and to assess realization of desired levels of performance in a sustained and objective way.
Chapman (2000)

And a *cultural* indicator is a statistic that can be used to make sense of, monitor, or evaluate some aspect of culture, such as the arts, or cultural policies, programs and activities (although, as will be highlighted later, this is a rather simple view, as indicators usually also influence behaviour and have strategic effects beyond mere measurement). NASA (1996) contains a set of definitions of cultural indicators and other related concepts (reproduced in Baeker (2002)).

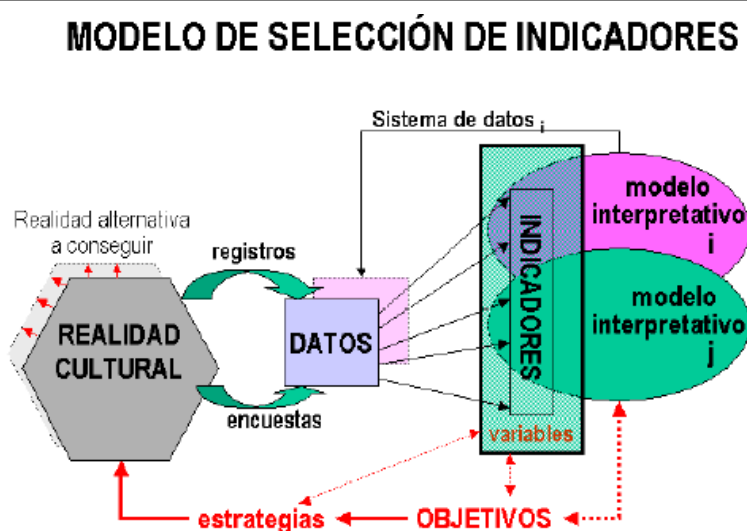
Relationships between data, indicators, and analysis

Indicators lie at the nexus between *production* of data on cultural phenomena, and the *analysis* of those phenomena; between the supply of cultural statistics (data quality, data architectures, statistical frameworks etc.) and the demand for meaningful statistics (for use in analysis, evaluation and policymaking). The discussions below explore each of these linkages in turn. Duxbury (2003), Baeker (2002) and Innes and Booher (2000) contain good general discussions about the complex interrelationships.

Data, statistics and indicators

Figure 3, reproduced from Bonet (2004), maps the relationship between data and the interpretive or conceptual models that drive the design of indicators. As the figure indicates, data are designed to approximate a cultural 'reality'. Indicators utilise data to understand this reality, albeit in a necessarily 'flawed' way (Cobb and Rixford, 1998; 20). Data architectures and indicator design are the 'lens' through which we measure culture, and these are influenced by changes in the way we conceptualise culture.

Figure 3



Source: Bonet (2004)

Indicators and analysis

As Mercer (2004; 3) notes, statistics become indicators ‘only...when transformed - or when value is added - through a route map of policy’. Figure 4 from Bonet (2004) provides a ‘map’ of the use of indicators in policymaking and program delivery.

The common view is that indicators should meet some specific policy or analytical information need:

Statistics and data refer to ‘multi-purpose’ quantitative information; in the case of indicators, the information has been processed to correspond to the specific needs of the users.
European Taskforce on Culture and Development (1997)

Commentators stress that the view of indicators as a tool of policymaking, analysis and evaluation should recognise that indicators are ‘non-neutral’, that the simple act of measurement can itself influence the system being measured. As Schuster (1997; 255) notes:

[M]ost considerations of cultural indicators, particularly government-sponsored conferences and seminars on this topic, focus on their descriptive abilities and view them as measuring, but not contaminating, the actual conduct of artistic and cultural life. The extent to which it is possible to achieve this idealized, value-free arm’s length relationship is rather limited if the actors in the cultural policy system have any identifiable interest in the numerical value of an indicator. Conversely, one could ask, if there is no interest in knowing the numerical value for that indicator, why would it be collected and documented in the first place?’

Bonet’s models in figures 3 and 4 suggest that the causal relationship between indicator production and indicator use is complex, with feedback mechanisms *from* data production *to* interpretation and policy analysis. The position of indicator development within the policy development cycle is therefore a crucial consideration (DCMS, 2002b), as the perception of culture and cultural policy inevitably changes as data reveal new insights and new challenges. Baeker (2002; 23) notes that this extends beyond government policy to the whole cultural sector: ‘forcing the cultural sector to confront which measures and indicators to use can act to drive a clarification of ideas and values in the sector.’ Innes and Booher (2000) argue that sustainable community indicators should be viewed as part of an adaptive learning system, and similar cases for an organic, holistic, participatory, or systems approaches can be found in the cultural indicators literature (for example Cliche, 2003; Duxbury, 2003; Baeker, 2002; and Mitchell, 1996).

Figure 4: Indicators in policymaking and program delivery



Source: Bonet (2004)

What are cultural indicators used for?

The previous discussion has highlighted the multiple uses to which cultural indicators can be put. Four general uses are explored in more detail below. Different uses may be better served by different types of indicators.

Monitoring and evaluation

Most commentators recognise at least two main types of uses for cultural indicators: monitoring (observing cultural phenomena, their changes and trends) and evaluation (measuring the efficacy of policies and programs aimed at impacting on cultural phenomena). For example, the European Taskforce on Culture and Development (1997; 299) distinguishes between ‘indicators ...for specific evaluative or policy planning purposes’ and ‘systems of indicators used for continuous monitoring of development in a given policy area.’

Brown and Corbett (1997; iii) expand this further into a five-part typology of ‘basic’ uses of social indicators in policy:

1. **Description**, for the sake of knowledge about society;
2. **Monitoring**, to track outcomes that may require policy intervention;
3. **Setting goals**, to establish quantifiable thresholds to be met within specific timeframes;
4. **Outcomes-based accountability**, to hold managers, agencies, government, and communities responsible for improving social well-being and for meeting established goals; and

5. **Evaluation**, to determine which programs and policies are effective (or destructive) and why.

Brown and Corbett (1997; iii) go on to suggest that ‘the technical and political challenges...generally [become] more formidable as one moves closer to the core of the typology’ (ie from 1 to 5 above).

At the very least, the basic distinction should be made between indicators for monitoring and indicators for evaluation, as indicators developed for each purpose will differ. As D’Art respondent, Frank Stroobandt, noted ‘[indicator] frameworks developed for the evaluation of a specific policy will differ from those developed for monitoring: a framework for policy evaluation is organised around the (specific) goals of a policy plan; a framework for monitoring will be more abstract, since monitoring is a continuous activity for different policy periods. A monitoring framework cannot be developed using specific goals, but rather general policy themes such as participation, distribution of cultural opportunities, etc.’

The use of indicators in evaluation also requires a higher level of sophistication than more simple uses, such as monitoring. To evaluate a particular activity, such as an arts policy or program, requires at least two additional considerations:

- 1) The attribution of causality. Evaluation usually attempts to establish whether some activity *A* caused some outcome *B*. Attributing such ‘cause and effect’ is difficult to do statistically. Most statistical evaluations measure *correlation* rather than causation. Establishing causation is complicated, expensive and often impossible.
- 2) The isolation of effects. Evaluation requires that a measured effect be attributed to the activity being evaluated. To what extent could other ‘exogenous’ factors have caused the effect? For example, two years after implementing an audience development program, data might indicate that arts attendance rates have risen. But how much of the increase can be attributed to the program itself, and how much to other factors such as an increase in disposable incomes, or a reduction in the relative price of arts performances?

Evaluation is therefore a much more complicated proposition than simple monitoring, requiring a deeper understanding of what it is that an indicator signals, and what other, ‘exogenous’, influences might produce a change in an indicator. Matarasso (1996) has a more detailed discussion.

Learning

In the framework above, the use of indicators moves from a passive, neutral, role (describing, monitoring) to a more active, non-neutral role (goal-setting, evaluating). ‘Learning’ is another active use identified in the literature, and by the IFACCA board (appendix 3), in which indicators are viewed as a tool for learning, adapting and changing. Statistical indicators are, for example, an integral component of York’s (2003) ‘evaluative learning’ process. Innes and Booher (2000; 10) go as far to suggest that ‘indicators influence *most* through a collaborative learning process [emphasis added].’

Influencing behaviour and attitudes: 'strategic' effects

Another active use of indicators identified in the literature is the influencing of behaviours and attitudes – what will be called here 'strategic effects'. For example, Pignataro (2003; 371) notes that indicators 'tend to affect the behaviour of institutions according to the incentives arising from the prediction about their possible utilization.' Schuster (1997) provides examples taken from arts policy in the USA.

Wider strategic effects have been identified by Roemer and Castellanos (2002), who suggest that cultural indicators can be useful in building public confidence in cultural institutions, and by Fukuda-Parr (2001), who suggests that indicators can stimulate policy dialogue. Innes and Booher (2000; 10) argue that strategic benefits such as these can be primarily gained during the course of indicator development, rather than upon the publication of indicators.

Concerns are also expressed in the literature that indicators can influence behaviours in undesirable or unintended ways. Schuster (1997; 257) for example argues:

'one has to be very careful in thinking about counterproductive behavior as actors in the system adjust their behavior to take account of what they each perceive as their own best interests. In the respect, even the simplest indicators might turn out to have undesirable properties.'

A variety of similar undesirable strategic effects – or 'strategic hazards' – are noted in Duxbury (2003; 12), Dhakal and Imura (2003), Brown and Corbett (1997; vi), and IFACCA (2004).

Advocacy

Cultural indicators are frequently used for advocacy, including the justification of cultural policies (Poirier, 2003). This use raises issues similar to the strategic issues outlined above, although advocacy might be viewed as a 'special case'. Discussions about cultural indicators at the IFACCA board meeting in April 2004, and at the IFACCA researchers' meeting in August 2004 (appendix 3), identified tensions between the research and policymaking, and between analysis and advocacy. Though it is still unclear how best to ease the tensions between research and advocacy, it is worthwhile simply identifying that indicators developed for advocacy purposes may differ from indicators developed for analytical and evaluation purposes. Indicators developed solely for advocacy will, for example, account for benefits of culture but rarely for costs. Accounting for costs is crucial for good evaluation, as the arguments surrounding Matarasso (1997) indicate (see Oakley, 2004; Matarasso, 2003; and Merli, 2002). It has also been argued that indicators developed for advocacy may be 'unscientifically' exaggerated to support the advocacy case (Schuster, 2002; Madden, 2001). As Stake (1997; 475) comments 'we evaluators are caught in the web of advocacy and have become unwittingly, sometimes willingly, simply a party to promotionalism.'

Use of indicators by arts support agencies

Arts support agencies might use a variety of indicators for a variety of purposes. Some examples are:

- monitoring and evaluating arts policies
- monitoring change in the arts and cultural sectors
- evaluating program delivery
- grants acquittal processes

- advocating the arts to government, other government agencies, the public, and businesses
- providing expert advice on the arts to government, other government agencies, the public, and businesses
- reporting on ‘whole-of-government’ policies
- monitoring and evaluating performance agreements with contracted cultural organisations and institutions (such as major performing arts organisations with multi-year funding)
- strategic development and forward planning

Examples of how some of these indicators are used in practice can be found in published performance reports of arts agencies (for example, Canada Council, 2002; and Arts Victoria, 2003).

Types of indicators

At an even high level, there are many ways of thinking about different types of indicators. Some examples are:

- 1) Matarasso (2001) distinguishes between
 - cultural indicators, such as ‘quality of life’ indicators; and
 - performance indicators for the cultural sector, such as financial indicators for the cultural industries and cultural institutions.
- 2) At a meeting in August 2004, IFACCA researchers emphasised the distinction between
 - cultural indicators; and
 - cultural *policy* indicators.
- 3) Researchers also suggested that a distinction can be made between
 - indicators about culture *per se* (eg. cultural audiences, health of cultural organisations); and
 - cultural components of other indicators (eg. neighbourhood vibrancy indicators).
- 4) A similar distinction was noted by the IFACCA board between
 - *intrinsic* indicators; and
 - *instrumental* indicators.
- 5) The board also discussed the difference between
 - arts indicators; and
 - cultural indicators (discussed in more detail later).

Other high-level distinctions are evident in the literature on social indicators. Sawicki (2002), for example, distinguishes between ‘quality of life’ and ‘quality of place’ indicators. Noll (2002) contrasts ‘objective’ and ‘subjective’ indicators. Even others are discussed in Dhakal and Imura (2003).

Indicator hierarchies

Different types of indicators may also be applied at different levels. In any policy arena, certain unifying themes will be replicated across hierarchies, but different objectives and methods may need to be applied at different levels of the hierarchy for indicators to be effective (Dhakal and Imura, 2003). For example, the types of cultural indicators used at a national level are likely to differ from the types of cultural indicators applied at

the level of a community arts program. Some analysts adopt hierarchical frameworks to strike a balance between similarities and differences across hierarchies. An example of a three-tiered hierarchy is:

- *Macro* indicators for sector-wide monitoring and evaluation, eg. cultural indicators of development, and indicators of cultural rights.
- *Meso* indicators for regional or cross-agency policy monitoring and evaluation, eg. indicators that measure outcomes of an arts council policy, such as a disability policy.
- *Micro* indicators for agency program monitoring and evaluation, eg. indicators that measure outcomes of an arts event.

Figure 5 provides a hierarchical view of indicators with some examples. The indicators at the various levels of a hierarchy will have a number of similarities, but they will also have a number of differences. For example, indicators of the ‘social’ impacts of the arts are used at both a micro and a macro level, but the indicators often differ in the way that they are constructed and the uses to which they are put.

Figure 5: Indicator hierarchies

Indicator type	Focus	Culture examples	Selected references
Macro	Generic	Cultural indicators for development	Baltà (2004) Mercer (2002)
		Indicators for evaluating national cultural policy	Nylöf (1997) Matarasso (1997)
Meso		Indicators for evaluating arts policies	van der Ploeg (2004) Joy et al (2004)
		Performance indicators for cultural institutions	South West Arts Marketing (2000) Pignataro (2003)
Micro	Specific	Indicators for evaluating community arts programs	Keating (2002)

Culture or arts indicators?

In discussions of cultural policy, the arts are commonly viewed as a subset of culture. It might be expected, then, that arts indicators would be included as part of any suite of cultural policy indicators. Many indicator sets do indeed include arts indicators (for example, Mercer, 2000; and Carrasco, 1999). But this is not always the case, especially when culture is viewed as primarily a social phenomenon (as in sociological and anthropological concepts of culture), where the more personal and individual aspects of artistic activity, such as the exploring of emotions and the enjoyment of aesthetic experience, can be overlooked. For example, the cultural indicators for development in UNESCO (1998 and 2000) focus on broader cultural phenomena and are clearly not

detailed enough to serve as a set of indicators for arts policy. Similarly, the indicators for cultural consumption discussed in Katz-Gerro (2004), since they focus on social aspects of culture only, do not measure artistic experiences in sufficient depth to serve all the purposes of arts policy.

What makes a good indicator?

This section sets out some lists, taken from the literature, about what makes a good indicator. A number of the criteria recur regularly. As Dhakal and Imura (2003) suggest, not all criteria can be met. Indicator development is, then, a matter of deciding which criteria to prioritise.

Pfenniger (2004; 4) states that at the very least, an indicator should be:³

- reliable
- up-to-date
- clear
- intertemporally and geographically comparable
- accessible and relevant for cultural policy.

Lievesley (2001; 377) lists a set of questions for statisticians to ask about the goals set for indicators:

- a) Are they realistic?
- b) Can they be measured?
- c) Will they show enough change over time to be valuable as yardsticks?
- d) Are relevant benchmarks in place?
- e) Are they universal and so they make sense in different parts of the world?
- f) Are they coherent with what has been used before?

UNRISD and UNESCO (1997; 8) propose that cultural indicators of development should:

- a) not be dependent on market performance, as are GDP data;
- b) avoid measures that assume that all countries will inevitably develop along the same lines (sensitive to cultural diversity);
- c) avoid measures that are excessively ethnocentric, eg the concept of cultural heritage should encompass criteria used to define it in different terms;
- d) probably not be based on absolute minima, eg nutrition;
- e) be sensitive to distribution by groups, gender, ethnicity, and so on (unlike average per capita GDP);
- f) lend themselves to international comparison; and
- g) be simple and readily understandable. In some cases, giving ranges and/or degrees of confidence may be required to provide a measure of their reliability.

Morton (1996; 120) states that the process of selecting specific measures of performance should be guided by three key criteria:

1. Relevance
2. Measurability
3. Availability.

³ Translated from Spanish.

Pignataro's (2003) summary of performance indicators suggests that:

- There needs to be consistency between the purpose of measurement and the choice of indicator.
- An appropriate benchmark needs to be chosen.
- Indicators provide only one piece of information – they should be accompanied by other relevant information in order to make proper judgments or interpretations.

Criteria for good indicators taken from the non-cultural indicator literature are also relevant to cultural indicators. Some examples are listed below.

Brown and Corbett (1997). Aspects of a good indicator:

- Groundedness: it is grounded in a comprehensive model/theory
- Validity: it reflects the concept it is intended to represent
- Reliability: it measures the same thing over time and for different population subgroups
- Clarity: it is easily and immediately understood by users
- Regularity: it is measured regularly
- Timeliness: it is up-to-date
- Disaggregable: it is able to be disaggregated across social and geographic subgroups.

Belgian Government (2001). An indicator should:

- capture the essence of an issue
- have a clear and accepted normative interpretation;
- be robust and statistically validated;
- be responsive to policy interventions
- not be subject to manipulation;
- be measurable in a sufficiently comparable way
- be timely and susceptible to revision;
- be transparent.

Adams et al (2004; 43) argue that arts policy indicators should be

- Simple
- Unambiguous
- Capable of being measured
- Neutral ('evaluation processes must not threaten the autonomy of artistic decisions nor compartmentalise the arts to such a degree that they become entirely subservient to inappropriate utilitarian ambitions').
- They also argue that *qualitative* indicators need to be sensitive to the nature of the artistic and creative process, including a recognition that artists will not always succeed. The same might be argued for quantitative evaluative measures.

Innes and Booher (2000):

- Indicators must measure something publicly valued
- Users must be involved in their design
- Their meaning must be understood and shared among those to whom they are relevant
- They must stand up to expert critique

- They must be trusted by all players.
- They must be linked conceptually and practically to actual policies or potential actions
- There must be a place in the decision/action process where they are to be discussed and linked to action.

Sawicki (2002; 25). Indicator systems should be:

- Focussed: an indicator system should be focussed on a specific policy area
- Valid (external and internal): indicator systems should withstand the scrutiny of experts judging whether the indicators and the goals of the project are consistent and have meaningful connections to policy
- Relevant: indicators should 'pass the market test. If citizens and public officials use the indicators on websites, in campaign debates and in forming policy, and governments, foundations and corporations provide funding to maintain them, they are demonstrating value by definition.'

Sharpe (1999; 44) goes as far as ranking a number of indicators of economic and social well-being according to certain criteria, including:

- Clear, practical purpose
- Grounded in well-established theory
- Possibility of disaggregation
- Availability of consistent time series
- Usefulness to policy makers.

Prioritising indicators

There is an almost limitless variety of indicators that can be applied to the cultural sphere. Commentators argue the need to focus on essential indicators. Matarasso (2001; 6) notes, '[o]ne of the problems with asking questions about cultural activity...is that there is almost no end to the interesting things one would like to know' and therefore 'it is essential to decide what level of information about the cultural sector can usefully and sustainably be collected.'

Nylöf (1997; 367) concurs: 'Indicators must be chosen with care; not too numerous, enough to represent the whole spectrum to be evaluated, sensitive to changes. It is also advantageous if they are relatively simple to register regularly, so that temporal series may be compiled. Choosing indicators entails compromising between the ideal and the possible.'

How to develop cultural indicators

Chapman (2000; 1) offers five 'methodological preconditions' for monitoring human rights that stand as an exemplar for any indicator system:

1. Conceptualization: understanding and articulating what is to be measured by indicators.
2. Delineation of performance standards: definition of indicators and benchmarks.
3. Collection of relevant, reliable and valid data.

4. Development of an information management system (particularly so that trends can be analysed).
5. Ability to analyse/interpret indicators.

Fukuda-Parr (2001; 2-3) presents a step-by-step procedure for indicator development:

‘First, we need to define what we are trying to capture:

- What is precisely the reality that we want to measure?... How should we evaluate progress?
- What are the key dimensions? Most social and economic realities are complex and multi-dimensional. No single indicator can reflect such a reality. Culture is no exception. It is a complex reality that needs to be 'unpacked' into key dimensions.

Next, to select indicators, we need to ask:

- Are these components quantifiable? Most development goals are complex and may well not be quantifiable. If not, it is important to acknowledge that only partial indicators can be developed.
- If so, do measures exist, and if not, do adequate proxies exist?
- What is the data availability for the indicators selected?

Finally, we need to consider developing a composite index:

- Is it desirable?
- If so, what should be the methodology for aggregation and weighting?’

Schuster (2001; 15) highlights some overriding considerations for performance indicator developers:

‘The literature on performance indicators is a rich one, pointing to a number of aspects that one would want to consider. I mention here just a few:

- One should distinguish between measuring inputs, outputs, and outcomes and be sure that there is appropriate emphasis placed on outcomes;
- One should be wary of total performance indicators (one indicator that purports to measure an index of overall performance) as opposed to multiple indicators reflecting various aspects of policy management;
- One needs to carefully consider what conceptual variable it is that one wishes to measure, what variable can actually be measured, and how it is to be measured;
- One might distinguish, as Weil suggests, between red flags, effectiveness measures, integrity measures (which ask, how well do its activities match what the institution says it is doing?), and efficiency measures;
- One might distinguish, as I have suggested, between performance indicators to affect behavior, performance indicators to evaluate behavior, performance indicators to monitor behavior, and performance indicators to infer behavior; and
- One should be sure to collect longitudinal data as well as cross-sectional data so that one can make both types of comparisons.’

Duxbury (2003; 8-9) discusses a number of high-level and conceptual considerations that are particularly relevant in cultural indicator development. She argues that questions of intent and meaningfulness must permeate indicator development, including due consideration of the following:

- Why are indicators being developed?
- Why are indicators needed?
- What is it important to measure?

- What is being indicated?
- How should indicators be chosen?
- What conceptual frameworks, administrative processes, and governance realities should be considered?
- Can what we want to measure be measured?
- Is an indicator really an indicator, or just a statistic?

She suggests that questions such as these are often neglected in the rush for results.

Mercer (2004) outlines similarly high-level, conceptual considerations, including:

- Indicators need to rest on a robust knowledge base, both quantitative and qualitative, which is constantly refreshed by research, both pure and applied.
- Indicators should be firmly related to or embedded in a policy framework or strategy from which they gain meaning and currency.
- Indicators or suites of indicators should be integrated and share a plausible common currency with other policy domains.

Lessons learned from the history of social indicators

Finally, Cobb and Rixford (1998) extract twelve lessons from the history of social indicators:

1. Having a number does not necessarily mean that you have a good indicator
2. Effective indicators require a clear conceptual basis.
3. There's no such thing as a value-free indicator.
4. Comprehensiveness may be the enemy of effectiveness.
5. The symbolic value of an indicator may outweigh its value as a literal measure.
6. Don't conflate indicators with reality.
7. A democratic indicators program requires more than good public participation processes.
8. Measurement does not necessarily induce appropriate action.
9. Better information may lead to better decisions and improved outcomes, but not as easily as it might seem.
10. Challenging prevailing wisdom about what causes a problem is often the first step to fixing it.
11. To take action, look for indicators that reveal causes, not symptoms.
12. You are more likely to move from indicators to outcomes if you have control over resources.

Cultural indicators: examples

As mentioned at the beginning of this appendix, it is difficult to describe in principle what an indicator is, or to describe in theory how an indicator differs from a simple statistic. Illustrating the difference with an example is also not simple, as the context and intended use of a statistic or indicator are important considerations. South West Arts Marketing (2000) contains a number of examples of how to construct various indicators for marketing and advocacy in arts companies. An example for arts policy is attempted here for arts employment. In this example, figures for New Zealand and the UK are taken from, respectively, Statistics New Zealand and Ministry of Cultural Affairs (1998) and Creigh-Tyte and Thomas (2001).

Developing an indicator for employment in cultural occupations

The number of people employed in cultural occupations is a statistic commonly used in cultural policy. In New Zealand in 1996, for example, it was estimated that 45,549 people were employed in cultural occupations.

This figure is clearly a statistic. It *describes* the number of people employed in culture. But the figure is not an indicator of employment, as it does not *imply* whether the number of people employed is high, low, or just right. Further contextual information is required to be able to make such an interpretation. Possible contextual information might be:

- 1) Compare the statistic with other countries: New Zealand cultural employment of 45,549 in 1996 compares with 392,000 people employed in cultural occupations in the UK in 1995. But this is clearly not a valid comparison, as the populations of these countries differ substantially (New Zealand around 4 million and the UK around 60 million).⁴ The ‘raw’ comparison does not contain enough meaning upon which to draw inferences – the data do not imply that more people are employed in cultural occupations in the UK than in New Zealand.
- 2) Compare the statistic with historical data from New Zealand, to obtain an idea of how 1996 levels compare to past employment levels. New Zealand employment in cultural occupations increased from 35,748 in 1991 to 45,549 in 1996, an increase of 27 percent. But again, this does not provide context, because it does not suggest whether this is a large or small increase – is it more or less than the rate of general employment growth in New Zealand over the same period?

There are a number of ways that a comparison with broader employment trends could be achieved. Growth rates could simply be compared between cultural occupations and all occupations. Another method, and one that makes it easier to undertake cross-country comparisons, is to convert the number of people employed in cultural occupations into a *ratio* of total employment. In 1996, 2.8 percent of people employed in New Zealand were in cultural occupations. By itself, this percentage is not an indicator, because we cannot tell if it is high or low. But we can now obtain a context with comparative data:

- 1) In 1996, 2.8 percent of all employed people in New Zealand were employed in a cultural occupation. In the UK in 1995, 1.5 percent of all employed people were employed in a cultural occupation.
- 2) Between 1991 and 1996, employment in cultural occupations in New Zealand grew from 2.6 percent to 2.8 percent of total employment.

In both cases, inferences can begin to be made about employment in cultural occupations in New Zealand. First, that in 1996, cultural occupations in New Zealand made up a larger proportion of total employment than in the UK.⁵ Second, that employment in cultural occupations in New Zealand grew faster than total employment between 1991 and 1996.

⁴ Population estimates taken from *The World Factbook*
<http://www.odci.gov/cia/publications/factbook/index.html>.

⁵ Making this comparison involves a number of assumptions, most of which are likely to be unrealistic, about similarities in the frameworks and methodologies used in the data from the two countries. For a full discussion, see IFACCA (2004).

Similarly:

- Many analysts present statistics on the proportion of people working part-time in culture. This is not an indicator until it is known what proportion of people work part-time in a comparative sample of workers (eg. total employment).
- Many present statistics on the median income of artists: this is not an indicator without comparison with the median incomes of some other group workers (eg. all workers, workers educated to a tertiary level, workers employed in comparable of occupations).
- Many present data on cultural attendances, such as attendances at an art gallery. Art gallery attendance is not an indicator until attendance rates per head of population is calculated and some appropriate comparison population found (eg. previous attendances, attendances in other countries, attendances at other venues).

The practical issues can, however, become exceedingly complex. Take the last example above of attendances at art galleries. Assume that data indicate an increase in attendance rates. From simple door counts alone, there is often no way of telling who these people are, how long they stayed at the gallery, what they did there, how satisfying their gallery experience was, or how their experience impacted on their lives. A measured increase in art gallery attendances per population may simply represent the same people attending more often (ie. audience diversity has remained the same). Or these same people may even be spending less time at each visit, so the total time that they are experiencing art remains the same (ie. cultural ‘consumption’ remains constant). And if, on the other hand, gallery attendance rates are declining, why are people not going? Indicators based on door counts do not answer this question.

Developers need to be clear about what it is they want to measure: audience numbers, or artistic experiences? Are indicators outputs, outcomes or impacts? Much of the cultural indicator literature presents data on outputs (such as participation rates), but not indicators of outcomes or impacts. For discussions of the distinction, see Selwood (2003) and York (2003; 8).

All quantitative measures involve assumptions and caveats if they are to be used as indicators of the ‘real world’. Many of the assumptions and caveats need to be dealt with on a case-by-case basis and cannot be predetermined by statistical rules or principles. The examples discussed here are simply intended to provide some insight into the type of analysis that needs to be undertaken in developing an effective indicator.

Appendix 3: Indicator fields for arts participation rates

Indicator field	Description	Example
Objective	The indicator's outcome or objective, as defined by the policy or program that gives it 'meaning or currency'.	A nation's citizens appreciate the arts.
Measure	A succinct name, or 'label' for the indicator.	Arts participation rate.
Aim	A description of how the indicator informs the objective.	Arts participation is a proxy for arts appreciation, as the more people appreciate the arts, the more they are likely to participate in the arts. (theoretical assumptions and caveats can be detailed in 'issues and limitations' below)
Definition	A definition of the statistical variable.	Number of people participating in the arts at least once in the previous 12 months as percent of total population.
Technical information	The 'metadata' (methodologies, survey instruments etc.) that underpin the indicator (including metadata for comparative variables if required).	Variable range: 0 to 100 Sample: People 15 years and older Survey: Annual survey of leisure participation, 1980 to 2005, etc.
Comparative context	The comparative information used to give the indicator meaning.	Compared with rates from previous years.
Direction	Describes what a change/difference in the indicator means.	A higher rate from previous years implies an increase in appreciation, and vice versa.
Sensitivity	Defines how much change/difference in the indicator is 'significant'.	A range of expected variation calculated from: 1) Variation across all leisure activities in survey; 2) Mean variation from previous years' arts participation. A result on or outside either of these ranges will be considered 'significant'.
External influences	The external or 'exogenous' influences that might cause a change/difference in the indicator (including, where possible, data for each exogenous factor and an analysis of its impact on the indicator).	- Changes in disposable incomes (positive correlation). Possible impact assessed by calculating the income 'elasticity' of arts participation from previous years and applying this to change in disposable income in current year. Examples of others: - Changes in price of arts goods and services relative to other goods and services. - Demographic changes, eg. change in age distribution of population.
Structure	Analysis of any of the indicator's interesting sub-components. Analysis of the variable by sub-populations.	- Break participation into (a) creating arts and (b) viewing or listening to arts. - Report arts participation by age, sex, location, income, etc.
Issues and limitations	A description of the limitations of the indicator in measuring the objective/outcome. A description of what the indicator does not measure.	- Discussion of why participation does not necessarily mean appreciation. - Indicator does not measure changes in quality of arts participation experience, or the frequency of participation (an increase in frequency would imply greater appreciation). - Boundary issues: are all arts included in the definition? If not, could a redrawing of the boundary alter the interpretation? Other indicators in the suite that the indicator should be interpreted in conjunction with, eg: frequency of participation; satisfaction with arts participation.
Data presentation	Clear presentation of data along with metadata, assumptions and caveats.	
Interpretation	What does the indicator say?	Provide an interpretation of the indicator values based on all caveats and assumptions.

Appendix 4: IFACCA's involvement in work on statistics and indicators

IFACCA is the first global network of national arts funding bodies. Founded in 2001, IFACCA has 47 national members and 35 affiliates in 50 countries. Our mission is to create an international resource and meeting ground for all those whose public responsibility it is to support excellence and diversity in artistic endeavour.

The IFACCA secretariat has undertaken a number of tasks relating to cultural statistics and cultural indicators:

- 1) *D'Art report*. In November 2002 we completed a D'art report on international comparisons of arts participations data. (<http://www.ifacca.org/files/participationstatsanalysis.pdf>).
- 2) *Ask IFACCA*. We have responded to two 'Ask IFACCA' questions sent by people looking for studies and information on cultural indicators. Each was sent a list of selected references and web resources. These are included in the bibliography to this paper.
- 3) *Data analysis*. IFACCA is undertaking the data analysis for an Australia Council project to make international data comparisons of cultural sectors (IFACCA, 2004).
- 4) *Project advice*. IFACCA is advising the New Zealand Ministry for Culture and Heritage on a project to develop cultural indicators for New Zealand.
- 5) *Researchers' meeting*. The Canada Council for the Arts hosted a meeting of researchers in Montréal, Canada, 24 August 2004 (http://www.ifacca.org/ifacca2/en/organisation/page04_miniView.asp?summitId=1). At the meeting, research managers from IFACCA's member agencies and other researchers discussed this paper and the issues surrounding the development of cultural indicators generally. A summary of the discussion is reproduced below.
- 6) *Board meetings*. The IFACCA board considered the discussion paper at its meeting in Washington DC, USA, in April 2004 (comments summarised below).
- 7) *World Summits*. Evaluation of arts policy was discussed at the first and second World Summits on the Arts and Culture (see www.artsummit.org) and is likely to be on the agenda for the third Summit.
- 8) *Liaison and contact*. The IFACCA secretariat is in frequent contact with national arts funding agencies that are working on cultural indicators.

IFACCA board meeting Washington DC, USA, April 2004

The IFACCA board discussed the issue of cultural indicators at its meeting in Washington DC, USA, in April 2004. Board members and observers (listed in appendix 4) made a number of comments in addition to the background paper that formed the basis of this D'Art report:

- It is important to develop indicators of *intrinsic* artistic and cultural values in addition to indicators of *instrumental* values such as economic and social impacts. It was agreed that such intrinsic arts indicators are already in use by

arts practitioners, although that these are not necessarily called ‘indicators’ or recognised as indicators.

- There is a need in arts policy to concentrate on developing a limited set of key indicators, and to measure what makes sense to measure.
- Performance indicators are a tool for learning as well as a tool for measuring.
- IFACCA’s primary objective should be to advance thinking on indicators relevant to contemporary arts practice and be clear about differentiating these from the broader cultural indicators (eg. cultural indicators that have been designed for development).
- Indicators should be developed from the ‘ground up’ to account for issues that might not be obvious at a more general level, such as the long ‘gestation’ of ideas preceding the creation of an artistic ‘moment’.
- Artistic indicators need to measure the ‘deep’ and peculiar aspects of art.
- There is a need to be clear about which definitions and frameworks are to be used in which contexts. Indicators can serve different objectives, and sometimes these objectives may not be complementary (as when advocacy clashes with policy development and evaluation).
- Finally, the board reinforced the need for *qualitative* indicators in arts policy. Illustrating the impacts of arts policy by using case studies and ‘telling stories’ and is as valuable an evaluation tool as ‘hard’ statistical information.

IFACCA researchers’ meeting, Montréal, Canada, August 2004

Workshop participants discussed statistics and indicators in general, and heard updates on the work of EUROSTAT and UNESCO’s Institute for Statistics. Discussions focussed on a number of crucial points:

- tensions between research and policymaking in how statistics are developed and used
- the need to be clear about what is meant when using the term ‘cultural indicators’
- the need to focus indicator development on essential statistics and indicators
- the need to clarify the purpose and objectives of indicators.

It was agreed that the IFACCA secretariat would finalise the discussion paper *Statistical Indicators for Arts Policy* based on comments made at the workshop and through feedback from others, and that the secretariat should investigate how to encourage information exchange on indicators, such as through a dedicated web-based forum.

Appendix 5: Respondents

Comments and input on the previous discussion paper were received from:

- . Hatto Fischer, Coordinator, Poiein Kai Prattein, Greece
- . Sue George, Arts Queensland, Australia
- . Joe Jobling, Scottish Executive
- . Professor Benjamin Juarez, Director, CIGCEA, Mexico
- . Clare Keating, Director, Effective Change Pty Ltd, Australia
- . Annamari Laaksonen, Interarts, Spain
- . Brigita Lipovšek, Undersecretary, Ministry for Culture, Slovenia
- . Robert Palmer, Palmer/Rae Associates, Belgium
- . Frank Stroobandt, Culture policy centre (Re-creatief Vlaanderen), University of Ghent, Belgium
- . Professor Andreas Wiesand, Director Zentrum für Kulturforschung, and Secretary General ERICarts-Institute, Germany

IFACCA board meeting

- . Risto Ruohonen, Director of Arts and Cultural Heritage and Special Government Advisor, Ministry of Education, Finland
- . Lee Suan Hiang, Chief Executive Officer, National Arts Council, Singapore
- . Kim Evans, Executive Director of Arts, Arts Council England
- . Nguyen Van Tinh, Deputy Director General of the International Cooperation Department at the Ministry of Culture and Information, Vietnam
- . John Hobday, Director, Canada Council for the Arts
- . Sarah Gardner, Executive Director, IFACCA
- . Jonathan Katz, Director, National Assembly of State Arts Agencies, USA

IFACCA researchers meeting

- . Keith Kelly, Canada Council for the Arts
- . Claire McCaughey, Canada Council for the Arts
- . Lisa Roberts, Canada Council for the Arts
- . André Courchesne, Canada Council for the Arts
- . Ann Bridgwood, Arts Council England
- . Merja Heikkinen, Arts Council of Finland
- . Ann Kellaway, Arts Council of Wales
- . Lisa Colley, Australia Council
- . Sarah Barns, Australia Council
- . Yuen Kum Cheong, National Arts Council Singapore
- . Caroline Docherty, Scottish Arts Council
- . Tanya Hutchinson, Scottish Arts Council
- . Mark Schuster, Massachusetts Institute of Technology, USA
- . Margaret Wyszomirski, Ohio State University, USA
- . Diane Dodd, Boekman Institute and CIRCLE, Spain
- . Jim McKenzie, Ministry for Culture and Heritage, New Zealand
- . Diane Stukel, UNESCO Institute of Statistics, Canada
- . Lidia Varbanova, European Cultural Foundation, Netherlands, and the Center for Intercultural and Social Development, Canada
- . Tim Jones, Toronto Artscape Inc., Canada
- . Pat Bradley, Ontario Arts Council, Canada
- . Murray Krantz, independent researcher, Canada
- . Christopher Madden, IFACCA

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