



Impact Toolkit for Archives and Museums

Aggregation Toolkit Guidance



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November 2016

1. Guide to Completing the Aggregated Impact Toolkit

The economic impact toolkit has been developed to help archives and museums to estimate the impact their organisation has on the local economy. The aggregation toolkit is for representatives of organisations operating at the regional or national level to aggregate findings from toolkits completed by organisations based within their geographical area of representation. The Aggregation Toolkit is divided into five separate worksheets:

1. Organisation background and procurement details
2. Expenditure on employees (salary costs)
3. Volunteer impacts
4. Visitor related impacts
5. Overall impacts derived from the above.

Within each section there are a series of yellow cells and a series of green cells. You should only enter information into yellow cells. The green cells will automatically calculate impact figures based on the numbers you have entered. You will need completed organisation toolkits to hand as the aggregation toolkit is based on figures derived from these.

1.1. Organisation background and procurement details

On the organisation background and procurement worksheet (worksheet 1), please provide the name of your organisation and the region or country (if within a devolved nation) in which it is based using the drop down list provided.

Then add all organisations that you want to include in the aggregation toolkit into column A under "Museum/Archive". In column B please include expenditure information from each of the respective organisations listed using the information contained in cell **B14** of the organisation impact toolkit, from the background and procurement spreadsheet "Total Annual Value of Expenditure on Goods and Services in Region/Nation" (the cell circled in the figure overleaf).

| | A | B | C | D | E | F | G |
|----|---|---|---|---|------------------------------|---|---|
| 1 | ALMAUK ARCHIVES LIBRARIES & MUSEUMS ALLIANCE UK | | wavehill ymchwil gwerthuso arolygon research evaluation surveys | | ERS Research and Consultancy | | |
| 2 | | | | | | | |
| 3 | Organisation Details | | | | | | |
| 4 | Name | | | | | | |
| 5 | Location - Local Authority Area | | | | | | |
| 6 | Region/Home Nation | | | | | | |
| 7 | | | | | | | |
| 8 | Non-salaried Operational Expenditure | | | | | | |
| 9 | Total annual value of expenditure on goods & services in local area | | | | | | |
| 10 | 10 | | | | | | |
| 11 | 11 | | | | | | |
| 12 | 12 | | | | | | |
| 13 | 13 | | | | | | |
| 14 | 14 | | £0 | | | | |
| 15 | 15 | | £0 | | | | |
| 16 | 16 | | | | | | |
| 17 | 17 | | | | | | |
| 18 | 18 | | | | | | |
| 19 | 19 | | | | | | |
| 20 | 20 | | | | | | |
| 21 | 21 | | | | | | |

Non-salaried operational expenditure relates to all annual expenditure that is not related to the payment of salaries for existing staff (part time, temporary or full time).

Spend incurred on suppliers operating outside of your region is considered to be “leakage” (for example if your website is developed by a supplier based elsewhere within the UK, your expenditure becomes their income to spend where they live) and this has little or no impact on the regional economy within which you are based.

1.2. Employee Expenditure

This worksheet (worksheet 2) focuses on the expenditure on personnel/staff employed by organisations operating within your region/devolved nation.

Again, please list the organisations that you are including in this spreadsheet and then include the figures for each organisation as detailed within **row 43** of worksheet 2 of an organisation’s personal impact toolkit (circled in the figure below).

You will need to scroll down the spreadsheet to locate this row.

| | £0-10k (pro rata) | £11-20k | £21-30k | £31-40k | £41-50k | £51-60k | £61-70k | £71-80k | £81-100k | £101-150k | £150k+ | |
|----|---|------------|-------------|---------|---------|---------|---------|---------|----------|-----------|--------|--|
| 8 | | | | | | | | | | | | |
| 9 | | | | | | | | | | | | |
| 10 | | | | | | | | | | | | |
| 11 | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | |
| 13 | | | | | | | | | | | | |
| 14 | Volunteering | | | | | | | | | | | |
| 15 | Typical No. of Volunteer Hours (please specify time period) | | | | | | | | | | | |
| 16 | | | | | | | | | | | | |
| 17 | FTE local (direct) | 0 | | | | | | | | | | |
| 18 | FTE regional/national (direct) | 0 | | | | | | | | | | |
| 19 | FTE all | 0 | | | | | | | | | | |
| 20 | Salary Costs - local | £0 | | | | | | | | | | |
| 21 | Salary Costs - regional/national | £0 | | | | | | | | | | |
| 22 | Average Salary - local | £0 | | | | | | | | | | |
| 23 | Average Salary - regional/national | £0 | | | | | | | | | | |
| 24 | | | | | | | | | | | | |
| 25 | Local | Employment | | | | | | | | | | |
| 30 | Employment impact - local direct, indirect and induced | 0.0 | | | | | | | | | | |
| 31 | | | | | | | | | | | | |
| 32 | Non-local | Employment | | | | | | | | | | |
| 37 | Employment impact - regional direct, indirect and induced | 0.0 | | | | | | | | | | |
| 39 | Gross Local (direct, indirect and induced employment) | Employment | Expenditure | | | | | | | | | |
| 40 | Local | 0.0 | £0 | | | | | | | | | |
| 41 | | | | | | | | | | | | |
| 42 | | | | | | | | | | | | |
| 43 | | | | | | | | | | | | |
| 44 | FTE paid employees living either locally or regionally | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |

1.3. Volunteer hours

For volunteering impacts simply include details for each organisation you wish to include in Worksheet 3 of the Aggregate Toolkit. These figures are derived from Worksheet 2 of the organisation’s impact toolkit and you should note over what time period the hours are estimated as this will inform you as to which column you should input these figures.

1.4. Visitor Related Impacts

Visitor expenditure to inform the aggregated toolkit is drawn from the **Gross Direct, Indirect and Induced Visitor Impact** cell, circled below.

| | Museums (Benchmark) | Museums (own data) |
|---|---------------------|--------------------|
| 3 Visitor Related Expenditure | | |
| Tier 1 | | |
| 5 Annual number of visits | 0 | 15 |
| 6 Estimated proportion (%) of visits from repeat visitors | 0% | 1% |
| 7 Annual number of unique visitors | 0 | 15 |
| 8 Proportion (%) you perceive to be local / benchmark proportion | 22% | 1% |
| 9 Total number of unique "non-local" visitors | 0 | 15 |
| Tier 2 | | |
| 13 Annual number of local visitors | 0 | 0 |
| 14 Benchmark/estimated proportion (%) of visitors that are non-local day trippers | 39% | 15% |
| 15 Benchmark/ estimated proportion (%) of non-local visitors staying overnight | 39% | 15% |
| 16 Total Visitor Nights | 0 | 2 |
| Tier 3 | | |
| 19 MUSEUM ONLY - Average no. of nights and overnight visitor stays | | |
| 20 Proportion (%) of visitors stating that the museum/archive was a driver behind their visit | | 0% |
| 22 Tier 1 Direct Visitor Impacts | £0 | £505 |
| 23 Tier 2 Direct Visitor Impacts | | £195 |
| 24 Tier 3 Direct Visitor Impacts | | £0 |
| 25 | | |
| 33 Gross Direct, Indirect and Induced Visitor Impacts | £0 | £195 |

1.5. Overall Impact

The overall impact worksheet pulls together all the values that have been calculated into one easy-to-view table. The table provides details of total impact (direct, indirect and induced) across your region/devolved nation, expressed as expenditure, as full time equivalents and, most importantly (for assessing economic impact) in gross value added (GVA) terms. The total impact takes account of leakage of spend outside of the areas, displacement of some significance (e.g. one museum taking market share (visitors) from another within the region) and the multiplier effect, the assumptions for each of these figures are outlined in the following section.

2. Data Sources

- Impact approach (utilising leakage, displacement and multiplier effects) informed by the latest Additionality Guide (2014)¹ and Research to Improve the Assessment of Additionality, BIS (Dec 2009).
- Benchmark figures (where primary research or sector specific (museum or archive sector data) is not available):
 - Deadweight (0.39 median average at the local level, 0.43 median average at the regional level);
 - Leakage ((where no primary research available), 6% median average at the local level, 5% median average at the regional level);
 - Displacement (12% median average at the local level and 25% median average at the regional level) and
 - Multiplier (1.25 at the local level and 1.45 at the regional level) indicators derived from: Research to Improve the Assessment of Additionality, BIS Occasional Paper – October 2009 (leakage is derived from actual figures).
- Attribution is also taken from research into the economic value of independent museums – the document can be found on the following weblink:
<http://www.aim-museums.co.uk/downloads/f6e017ac-8f11-11e3-8be4-001999b209eb.pdf>
- Benchmark Visitors spend derived from: GB Tourism Survey 2015 (average spend per night figures) whilst for Northern Ireland spend derived from Northern Ireland Statistics and Research Agency (NISRA 2014) and Day visitor spend from GB Day Visitor Statistics 2015 (for Wales and Scotland for spend associated with those who “visited a museum” for the English regions from wider average day spend) and Northern Ireland Annual Statistics 2013 (2014).
- GVA figures informed by GVA Turnover Ratios, derived from Annual Business Survey (ABS) regional turnover and GVA figures (2014) – released 26th July 2016.
- Archive visitor benchmark figures derived from: PSQG Survey of Visitors to UK Archives 2012, and 2014, CIPFA and associated benchmarks.

¹ <https://www.gov.uk/government/publications/additionality-guide>

