

Culture³

People | Prosperity | Planet

Measuring and managing the impact of cultural projects or services on People, Prosperity & Planet



Developed by MB Associates

About this resource

It was developed with:

Living Words

FUTURE FOUNDRY
creative people forging futures

**moving
memory**
DANCE THEATRE COMPANY



**folkestone
fringe**

It builds on years of testing with cultural organisations, especially:

at **the happy museum**

A movement for sustainable wellbeing in museums

A Creative People and Places programme in Lincolnshire



Culture³'s key values are:

- Peer to peer development and mutual support
- The need to be 'good enough' rather than perfect

Cathy Westbrook, Diane Dever, Lisa Oulton, Lucy Medhurst and Susanna Howard all gave their time, commitment and willingness to experiment.

Authored by Mandy Barnett with Amy Robinson and Ruth Melville. Designed by Jim Stokes, with images from cultural partners who focus on social impact.

We would really appreciate it if you could credit us if you share these slides.

CORE principles

We have some CORE messages about being true to our principles, and not letting perfection get in the way of progress; of being:

Convincing

relevant and suitable for the people we are talking to.

On message

about our Story of Change and in keeping with our ethos.

Realistic

achievable and proportionate for our service.

Enough

to evidence what we need to, in a way that is good enough.

There are 6 sections

1



Scoping & planning

- 1 Story of Change
- 2 Scope
- 3 Review methods

Plan to make a difference, and to be seen to be making a difference with minimum waste and maximum learning

2



Evaluation framework

- 4 Key questions
- 5 Framework
- 6 New methods

Prepare by streamlining, and finalising what is CORE, Convincing, On message, Realistic and good Enough

3



Gathering evidence

- 7 Holistic approaches
- 8 Menu of methods
- 9 Tool Rules

Put in place the right tools and (behavioural) expertise for evidence-based learning; don't let perfection get in the way of progress

4



Analysing evidence

- 10 Record-keeping
- 11 Analysis
- 12 Adjustments
- 13 Valuation

Be organised, analytical and interpretive, so we don't over-claim results but do capture knock-on benefits

6



Managing change

- 17 Action
- 18 Improvement

Work with heads, hearts and minds - and follow through; innovation means things will get worse before they get better

5



Communicating learning

- 14 Validation
- 15 Recommendations
- 16 Reporting

Make sure principles underpin learning so it represents the people who matter, and prioritise to reach the people with power

For a toe in the water...

...to test a more impact focused approach, try some of these:

Scoping & planning

- 1. Story of Change** – Decide what *difference* you want to make with your service and to whom.
- 2. Scope** – Decide who your evaluation is for and what will convince them.
- 3. Review methods** – Re-read previous evaluations.

Evaluation Framework

- 4. Key questions** – Decide two or three questions that describe what you want to find out.
- 5. Framework** – Cross check your Story of Change against your evidence plans.
- 6. New methods** – Check your evidence will answer your key questions.

Gathering evidence

- 7. Holistic approaches** – Embed evidence collection in delivery where possible.
- 8. Menu of methods** – Use methods for open questions/narrative and closed questions/numbers.
- 9. Tool rules** – Try to collect ‘baseline’ information and avoid leading questions.

Analysing evidence

- 10. Record-keeping** – Keep data in one place and follow GDPR principles.
- 11. Analysis** – Combine some numbers with some narrative for a more complete story.
- 12. Adjustments** – Ask people ‘what would have happened anyway?’
- 13. Valuation** – Consult to prioritise outcomes and consider what else could have been funded.

Communicating learning

- 14. Validation** – Check your draft with the people to whom it matters.
- 15. Recommendations** – Conclude with a recommendation for what happens next time.
- 16. Reporting** – Share a summary with the people identified in your scope.

Managing change

- 17. Action** – Use your normal planning processes to schedule action on recommendations.
- 18. Improvement** – Think about heads, hearts and minds when planning action on recommendations.

Story of Change

A shared, logical plan (or review) of the who, how, what

and why?

Focus on 'why' not 'what'

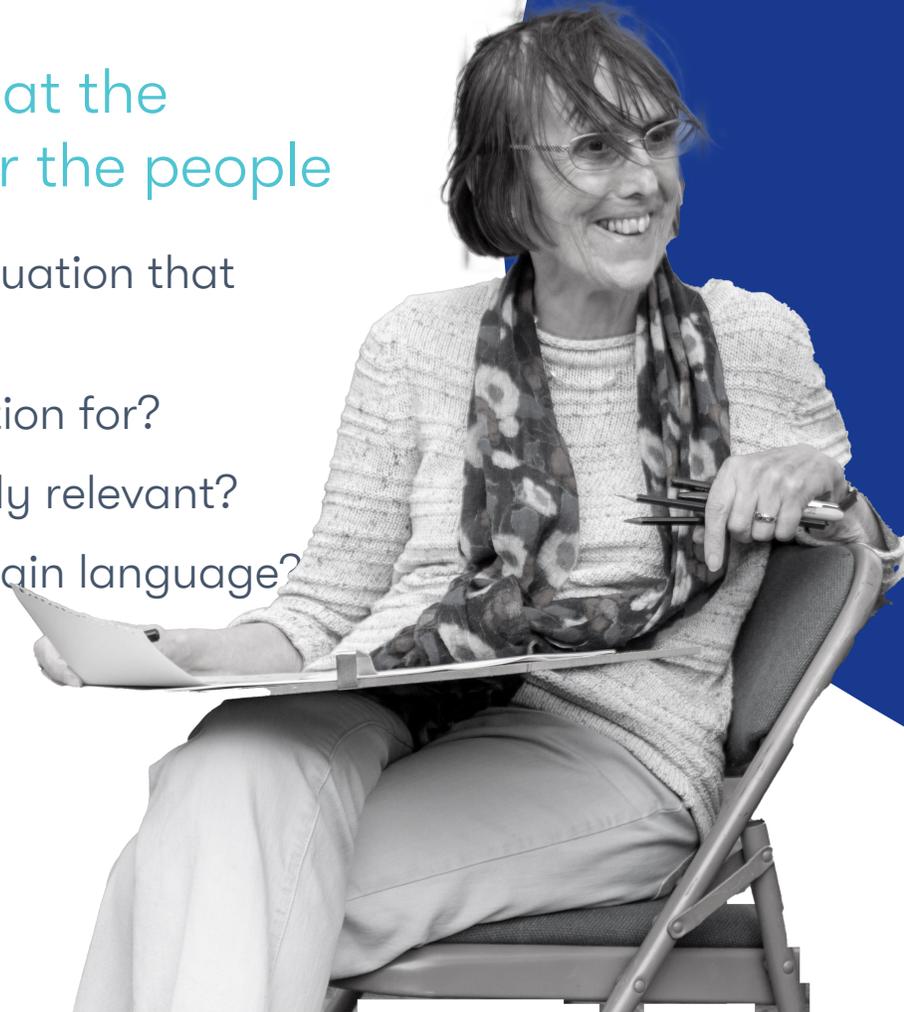
- Inform planning
- Decide what evidence to collect
- Make assumptions explicit
- Support co-production
- Look for shared themes
- Communicate in the right language.



Scope

Plan evaluation at the beginning, fit for the people and purpose

- Proportionate evaluation that works
- Who is the evaluation for?
- Nationally or locally relevant?
- 'Academic' or in plain language?
- Include all stages
- Define principles



Sketch Crawls with artist and animator, Neil Baker are one of the many events in Transported's community-focussed programme which aims to get more people in Boston Borough and South Holland enjoying and participating in arts activities © Electric Egg / Transported

Don't reinvent the wheel

Use available information & resources before new methods

- Resist the pressure to rush ahead
- Use existing reports and evidence
- Use national and partner evidence
- Consider investor requirements
- National guidance
- Opportunities from our own practice



With the Rolls-Royce Trent 1000 aero engine taking centre-stage, The Flight Deck at the Museum of Making tells the story of Rolls-Royce and its historic relationship with the city © Derby Museums

Key questions

Tell us the difference we've made and what works

- Agree evaluation questions that avoid an over-focus on what we do:
 - Who was involved?
 - Why was it worth being involved?
 - How did it happen?
 - Which features worked best?
- Ask consistent 'survey' questions to compare replies
- Observed or behavioural indicators, what would we see if things have changed?



Illuminate is an annual light parade held in Boston UK as part of Transported's community-focused programme which aims to get more people in Boston Borough and South Holland enjoying and participating in arts activities © Electric Egg / Transported

An Evaluation Framework

is comprehensive *and* streamlined, combining:

- Existing and new evidence methods that are Convincing, On message, Realistic and Enough
- The Story of Change
- The key questions,
 - The research questions
 - Any survey questions
 - Any indicators



New methods

Planning a new survey comes after we're fully prepared

- The final step in completing the Framework
- New methods in a consistent 'menu'.

Future Foundry offers transformational skills and career development programmes and projects that forge determined young cultural leaders, project young voices and advocate for sector and cultural change © Future Foundry



Holistic approaches

Consider approaches that are part of delivery

- Methods that 'form' the service, sometimes as action-research
- Embedded, interactive tools with participants
- Off-the-shelf, plug-in models – pros and cons
- Holistic approaches



With the Rolls-Royce Trent 1000 aero engine taking centre-stage, The Flight Deck at the Museum of Making tells the story of Rolls-Royce and its historic relationship with the city © Derby Museums

Agree a menu of methods

Everything we need to suit different people and cross-check results

- Consistency, so we get good at using the methods and will be robust
- Choice, so we can suit the people involved
- More than one method to cross-check results
- A range of methods that allow us to convince different people



A Festival of Fruit was one of many events within Transported's community-focused programme which aims to get more people in Boston Borough and South Holland enjoying and participating in arts activities © Electric Egg / Transported

Tool Rules

Consider robustness, but as a trade-off with usability

Robust, ethical (and creative) set up

- Baselines and plans for before & after
- Variety and coverage
- Thoughtful wording and question scales
- Robust, ethical (and creative) collection
- Confidentiality & representative samples
- Respect for respondents
- Anonymity or group discussion



Sketch Crawls with artist and animator, Neil Baker are one of the many events in Transported's community-focussed programme which aims to get more people in Boston Borough and South Holland enjoying and participating in arts activities © Electric Egg / Transported

Organise and protect data

For clarity, learning, legal and ethical reasons

- Organise data records so we:
 - Can pull learning from different places
 - Don't waste data we've collected
 - Can easily find quotes and figures
 - Can justify findings, saying who and how many have provided feedback
- Protect data for privacy and data regulation
- Use an information index or database but keep it simple



Sketch Crawls with artist and animator, Neil Baker are one of the many events in Transported's community-focussed programme which aims to get more people in Boston Borough and South Holland enjoying and participating in arts activities © Electric Egg / Transported

Analysis skills

Plan analysis using research questions with the report in mind

- Scoping should have guided our data
- The right people for this work
- Understand narrative and numbers, pictures or observations
- Avoid over emphasis on one perspective
- See key questions section for:

[Learning about who](#)

[Learning about why](#)

[Learning about how and what](#)

[Asking which features made the most difference](#)



Sketch Crawls with artist and animator, Neil Baker are one of the many events in Transported's community-focussed programme which aims to get more people in Boston Borough and South Holland enjoying and participating in arts activities © Electric Egg / Transported

Analysing evidence to learn

Look for a real difference, be open to negative or unexpected results.

- Prioritise the why
- Include who, how, what, & which elements made most difference
- Customer satisfaction is not enough - don't claim good practice where we've not had impact
- Learn from failure
- Uncover the unexpected



Adjustments so we don't over-claim

Not all changes will be due to

- US Some things like skills tend to improve anyway, though depends on context
- Some people have outcomes that are deteriorating – ‘we want to turn the curve’
- If improvements coincide with our service, we probably made a difference
- Account for partnerships, and other contributions, ‘a smaller slice of a bigger pie’
- Have we genuinely added new value or replaced something?
- Estimate longer term outcomes



Valuing outcomes

Applying number values to explore Social Value for Money

- Compare apples and pairs - the value of in-depth work with a few participants, with light-touch experiences for a bigger audience
- Clarify which outcomes are really important
- Establish Social Value for Money



Eric MacLennan's performance piece 'A journey to the centre of your heart' was part of Transported's community-focussed programme which aims to get more people in Boston Borough and South Holland enjoying and participating in arts activities © Electric Egg / Transported

Validating learning

Ask for feedback before it's too late

- If there is disagreement either:
 - Check and correct mis-interpretations or
 - Go back to evidence to make a better case
- Gain external credibility:
 - By formal assurance eg through Social Value UK
 - By asking a trusted person to write a foreword



Recommendations

Recommendations need careful consideration

- Make sure recommendations come from the evidence, and are about
 - making a bigger difference
 - limiting costs
 - or key features on which much else will hinge
- Focus on what matters to the organisation
- Break down big recommendations into manageable parts
- Look for high impact that's easy to deliver
- It may be necessary to validate again

Reporting

Reporting takes different forms and must be credible &

motivating

- Check scope for style and content
- Consider different media
- Include information on the method
- Use research questions to structure
- Presentations or dissemination may be important for wider learning



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Action

Implement learning to improve and motivate

- Use learning promptly for motivation
- Stick with it for the long-term
- Move towards evidence-based practice and planning
- Use evaluation to say no – every opportunity has an ‘opportunity cost’
- Act with caution as well as ambition – change one thing at a time
- Actions need a person, resources and a deadline

Improvements

Proactively manage the change using people skills as well as planning

Many change plans fail because they focus on rational plans and processes, without considering why people might not buy into the change, for emotional or political reasons.

There is much expertise about how to embed change, from the personal Unconscious Incompetence model to research into organisational change. See the Transformation Cycle below, for how these can combine.

It is crucial to recognise that things may well get worse before they get better, in fact we need disruption in order to break old habits.

We need to balance short term gains that will motivate people, with longer term plans to fully embed improvements.

Teaching or passing what we have learnt can help to consolidate our own learning

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