

# Tool table

Planning and review tools for organisational change										
Tool	Description	Provenance	Why do we plan to use it?	When do we use it?	How do we use it?	Usable versus robust?			What do the results tell us?	
						Usability	Useful and empowering	Maximise robustness	Numbers or narrative?	Indicators, outcomes or what works?
<b>Story of Change</b> 	Workshop approach to planning and reviewing the difference your group wants to make and how.	Devised internationally for participatory evaluation.	To plan and discuss what will work; for thinking about cause and effect.	At all planning and review stages	With a group of stakeholders using large visuals.	Quite simple when practised. 	Very useful and empowering if stakeholders are involved.	Ensure stakeholders are involved throughout.	A live, narrative tool. 	Defines what indicators and outcomes to measure.  First step in understanding what works (cause and effect).
<b>BAM card sort</b> 	Workshop approach to planning and reviewing group priorities.	Devised by HM programme to review HM principles.	For deciding priorities.	At selected planning and review stages	With a group of stakeholders using a card sort.	Quite simple when practised. 	Useful and empowering if decisions are acted on.	Risk of response bias (eg wanting to please) mitigated by anonymity and consistency.	A narrative and numbers tool. <b>123</b>	Can help identify what indicators and outcomes to measure.  An indication, but not proof, that attitudes or behaviour (outcomes) have changed.
<b>Tipping Point</b> 	Simple, workshop approach to planning and reviewing organisational change.	Devised by HM programme and an introduction to organisational change.	To identify organisational issues and inform the Story of Change.	Before or after Story of Change.	With a 'diagonal slice' team in the organisation using a card sort.	Simple. 	Empowering to voices not normally heard.	Good facilitation. Risk of simplification. Use Transformation tool for more sophistication.	An introductory, narrative tool. 	Can help identify what indicators and outcomes to measure.  A means to discuss what works.
<b>Transformation Cycle</b> 	Sophisticated, workshop approach to planning and reviewing organisational change.	Devised by HM programme combining organisational change theory with behaviour change theory.	To identify organisational issues and inform the Story of Change.	Before or after Story of Change.	With a 'diagonal slice' team in the organisation using a card sort.	Requires in-depth thinking. 	Useful, based on long term research. Empowering to voices not normally heard.	Good facilitation. Requires diverse input for a true reflection.	A live, narrative tool. 	Can help identify what indicators and outcomes to measure.  An indication, but not proof, that change is becoming embedded.

## Baseline and review tools for personal outcomes

Tool	Description	Provenance	Why do we plan to use it?	When do we use it?	How do we use it?	Usable versus robust?			What do the results tell us?	
						Usability	Useful and empowering	Maximise robustness	Numbers or narrative?	Indicators, outcomes or what works?
<b>LIFE</b> 	Sophisticated, individual survey before and after activity to identify Learning, Interaction, Feelings and Environmental awareness outcomes.	Developed by Happy Museum, Simetrica, and Oxford Internet Institute following action research by Happy Museums.	For understanding the impact of a discrete activity or services over the long term.	When there is time to set it up. As close to the start as possible and afterwards at a similar time.	Whenever you possibly can, with volunteers, audiences, participants or staff using an online survey.  Results will be returned to you with an analysis template.  Periodically HM will run national analysis.	Requires in-depth planning and delivery and some technical skills.  	Useful as highly robust. Empowering because it's personal.  However, some dislike a survey approach.	Risk of incorrect use. Follow guidance carefully.  Combine with other research to understand more about what works.	A subjective numbers tool (narrative with other elements).  <b>123</b>	Evidence of changes to outcomes.  Results are extremely robust for impact and relate to national datasets.  HM analysis is extremely robust.  Self-analysis allows room for errors.  Some understanding of what works
<b>Time Capsule</b> 	Simple, fun, workshop approach before and after activity to identify personal or social outcomes.	Developed by Reading Museum and adapted by HM.	For understanding the impact of a discrete activity or services over the long term.	When you want a group/social response. As close to the start as possible and afterwards at a similar time.	With a group using large visuals or card sort.	Quite simple.  	Useful as it is systematic.  Empowering because it's personal. Theatricality makes it appealing for some groups.	Risk that pre-chosen themes miss issues.  Try anonymity, and ensure consistency.  Combine with other research to understand what works.	A subjective narrative and numbers tool.  <b>123</b>	An indication, but not proof, of changes to outcomes but not necessarily as a result of the activity.
<b>Where Do you Stand?</b> 	Simple, workshop approach before, after and regularly through an activity to identify individual outcomes.	Used as a warm up by many facilitators. Adapted by HM.	For understanding the impact of a discrete activity or services over the long term.	When you want a simple approach. As close to the start as possible and afterwards at a similar time.	With a group using questions and physical response.	Very simple.  	Empowering because it's personal and public.  Could help with discussion and resilience.	Risk of response bias (eg wanting to fit in the group) mitigated by eyes closed and consistency.  Combine with other research to understand what works.	A subjective narrative and numbers tool.  <b>123</b>	An indication, but not proof, of changes to outcomes but not necessarily as a result of the activity.
<b>Happy Tracker</b> 	Very simple, workshop approach before, after, and regularly through a period to identify individual wellbeing outcomes (adapt to ask about other outcomes).	Devised by the Story Museum with New Economics Foundation.	For understanding impact over the long term.	Regularly at staff meetings or project sessions when you want a simple approach.	With a group using a questions and physical response.	Very simple.  	Empowering because it's personal and public.  Could help with discussion and resilience.  However, some might find it too personal.	Risk of response bias (eg wanting to please) mitigated by anonymity and consistency.  Combine with other research to understand what works.	A subjective narrative and numbers tool.  <b>123</b>	An indication, but not proof, of ongoing changes to wellbeing but not necessarily as a result of the activity.

## Review tools for personal outcomes or organisational change

Tool	Description	Provenance	Why do we plan to use it?	When do we use it?	How do we use it?	Usable versus robust?			What do the results tell us?	
						Usability	Useful and empowering	Maximise robustness	Numbers or narrative?	Indicators, outcomes or what works?
<b>Embedded Evaluation</b> 	A variety of on-gallery, open approaches which might be fun, embedded in the exhibition or activity to gain a variety of feedback.	The Story Museum and Beaney, originated ideas and other HM's tested (a variety of approaches used widely in the sector).	For understanding what works.	When there's time to devise methods creatively.	In keeping with the subject matter.	Requires in-depth planning and delivery. 	Can be very empowering as participants are part of the project.	Risk of response bias (eg because the exercise itself is fun) mitigated by very careful design.  Combine with other research to understand more about what works.	Subjective narrative or numbers tools. <b>123</b>	Captures real-time responses which might indicate outcomes.  Can indicate changes to outcomes but with very low confidence.  Can help understand what works.
<b>Narrative Evaluation</b> 	A desk work approach to identifying themes including how frequently they recur, by analysing written material.	Devised by HM to analyse museum's project logs and visitor books.	For understanding what works and the impact of a discrete activity or services over the long term.	When written material only is available, possibly unplanned.	Spreadsheet analysis or word clouds of narrative information.	Requires some technical skills. 	Useful when evaluation has not been planned.  Designed for objectivity rather than empowerment.	Ensure validity/objectivity by significant testing.	A potentially objective, narrative and numbers tool. <b>123</b>	Can help understand what works.
<b>Observational Evaluation</b> 	An on-gallery approach to pre-defined indicators of outcomes.	Adapted by HM from psychologists' approaches.	For understanding what works and the impact of a discrete activity or services over the long term.	When delivery resources are limited but there is time to set it up.	By observing people and recording their behaviours using codes.	Requires some technical skills. 	Useful when evaluation has not been planned.  Ethics of observation need consideration.  Designed for objectivity.  Observation role for front of house staff can be empowering.	Ensure validity/objectivity by significant testing.  Combine with other research to understand how behaviours lead to outcomes.	A potentially objective, narrative and numbers tool. <b>123</b>	Can help understand what works.
<b>Valuation DIY</b> 	A fun, workshop approach reviewing outcomes by prioritising or valuing outcomes.	Adapted from SROI practice by HM.	For ranking outcomes in terms of importance or value.	When a group of people continue to be involved. At the end of the activity.	With a group using large visuals or card sort.	Quite simple. 	Very useful and empowering as it compares outcomes through the voice of the person experiencing them.  Consensus may be a challenge.	Work with 5 or 6 people. Combine with other research into proxy valuations.	A subjective, narrative and numbers tool. <b>123</b>	Captures the importance of the outcomes (rather than how much outcome was achieved).