



Culture³

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

About this resource

- The resource was created over a year and a half, with the key values of:
 - Peer to peer (B2B) development so that organisations are supporting each other
 - The need to be 'good enough' rather than perfect
- It builds on many years of testing with cultural organisations, especially with:
 - Happy Museum – a movement for sustainable wellbeing in museums
 - Transported – a Creative People and Places programme in Lincolnshire

Authored by Mandy Barnett with Amy Robinson and Ruth Melville

About this resource

This resource was co-produced in 2018-19 by MB Associates and five organisations in Kent in partnership with Kent County Council.

- Culture³ is a general evaluation resource, with an emphasis on demonstrating social impact or value. Whereas much evaluation guidance focuses on the tools to use, this is about the whole process. Scoping the evaluation well, and sharing it afterwards are equally if not more important.
- It is a next step after working together on the Arts and Cultural Commissioning Toolkit and in response to the Social Value Act.
- It responds to societal challenges, from the need to present expertise that can be trusted, through uncertainty about our place in Europe, to declaration of an Environment and Climate Change Emergency.
- Developed with:

Living Words



**folkestone
fringe**

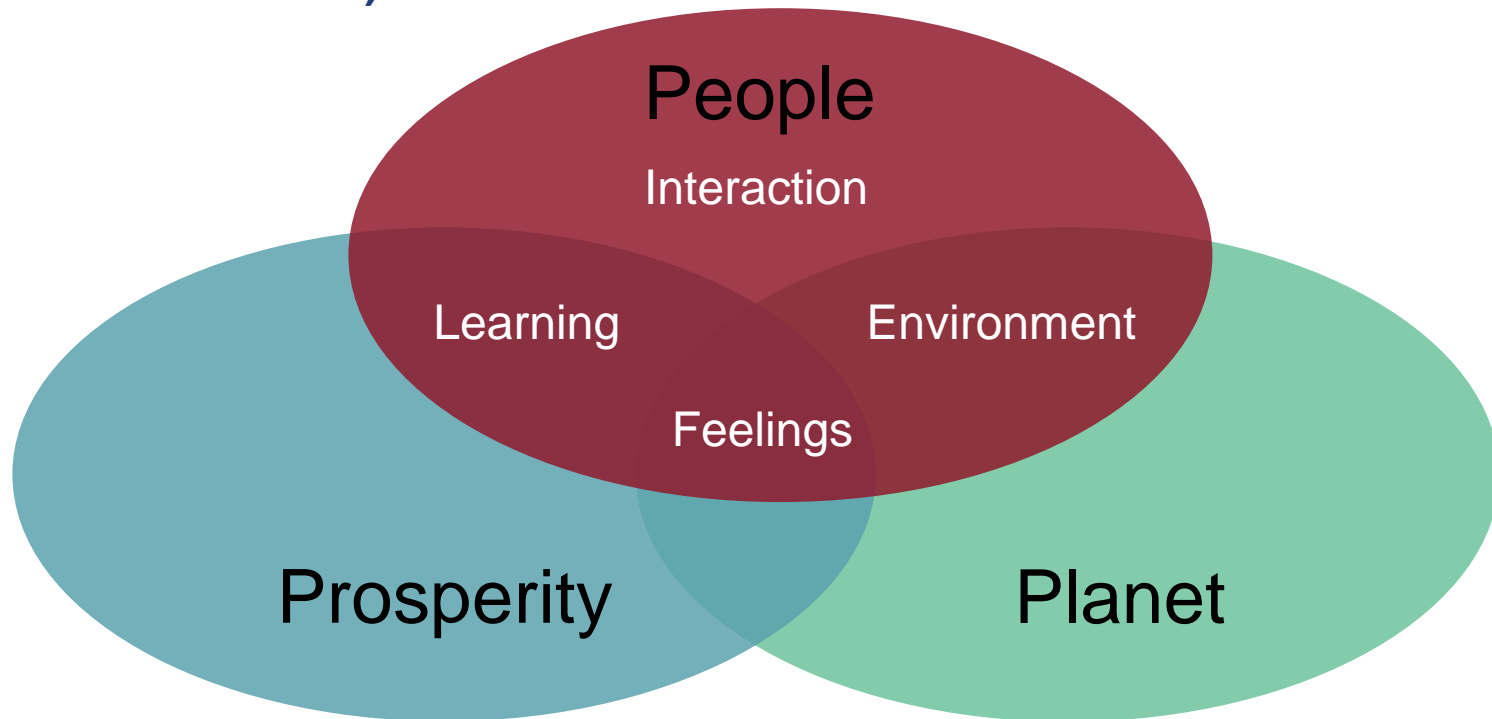


Culture³

Measuring and managing the impact of the SALT Festival
on People, Prosperity & Planet

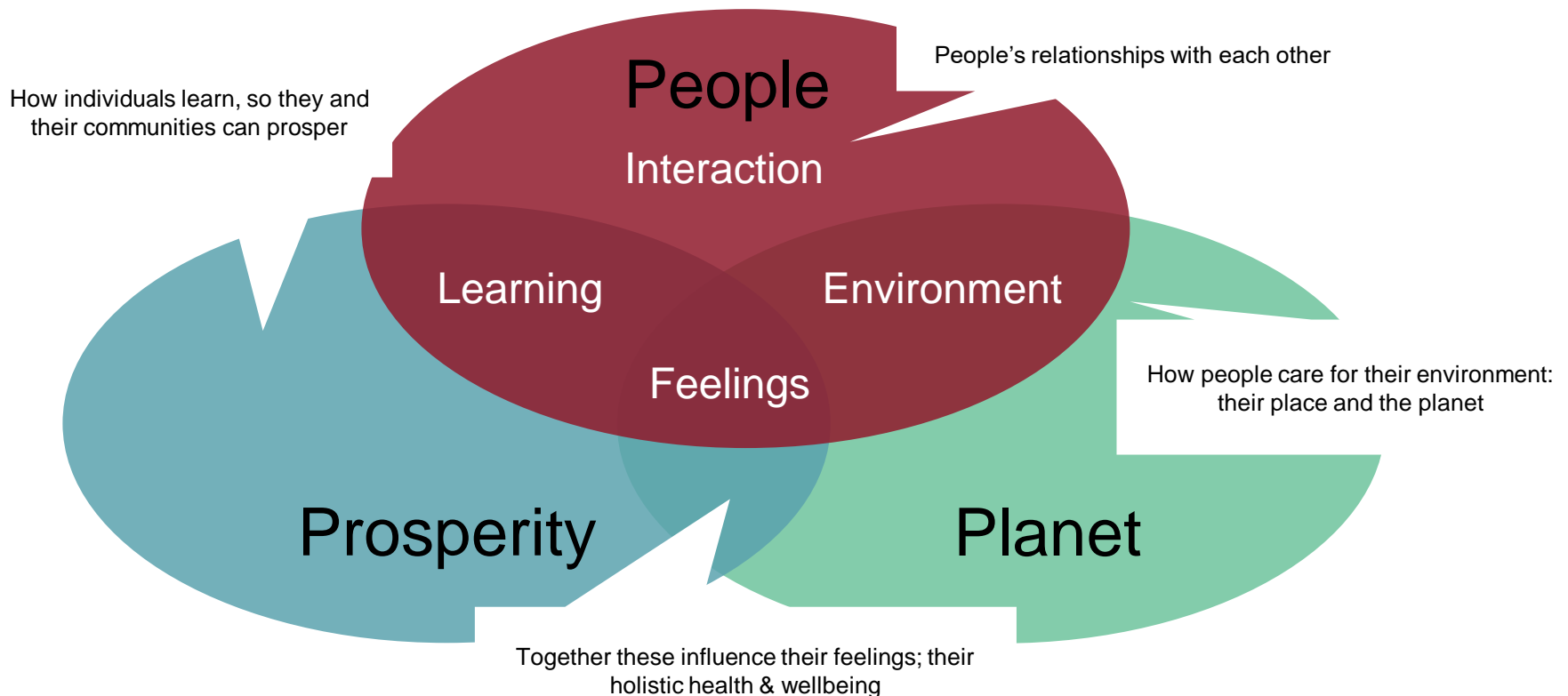
An introduction to Culture³

Culture³ is about people's relationships with the 3Ps through creativity and culture; our cultural LIFE (Learning, Interactions, Feelings and care for Environment)



An introduction to Culture³

These relationships include people's 'agency' or ability to make a difference:



How this resources differs from others

This is about managing, as well as measuring social impact.

- This resource is based on a Plan Do Review cycle starting by emphasising the importance of scoping appropriately and following through to some ideas about managing change.
- It includes links to tools and frameworks that can fit within this approach though these are advancing all the time, so it aims to share principles rather than specifics.
- It avoids technical language.

The guidance has six stages



The guidance has six stages

Including:
Introduction
Step by Step
Examples



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:

- **C**onvincing – relevant and suitable for the people we are talking to.
- **O**n message – about our Story of Change and in keeping with our ethos.
- **R**ealistic – achievable and proportionate for our service.
- **E**nough – to evidence what we need to, in a way that is good enough.

PLANNING

Plan to make a difference, and to be seen to be making a difference



PLANNING

The SALT director says scoping prompted new thinking - being explicit about tourism and public health, even though "I know all that".

Plan to make a difference, and to be seen to be making a difference



PREPARATION

Don't re-invent the wheel and consider what is CORE, Convincing, On message, Realistic and Enough



PREPARATION

Is it most useful to learn about the nature of the event or the plans or intention? Allowed team to reconnect with the purpose (about depth) and differentiate from others. Though this is a challenging conceptual conversation.

Don't re-invent the wheel and consider what is **CORE, Convincing, On message, Realistic and Enough**



EVIDENCE

Use the right tools and expertise for good evidence



EVIDENCE

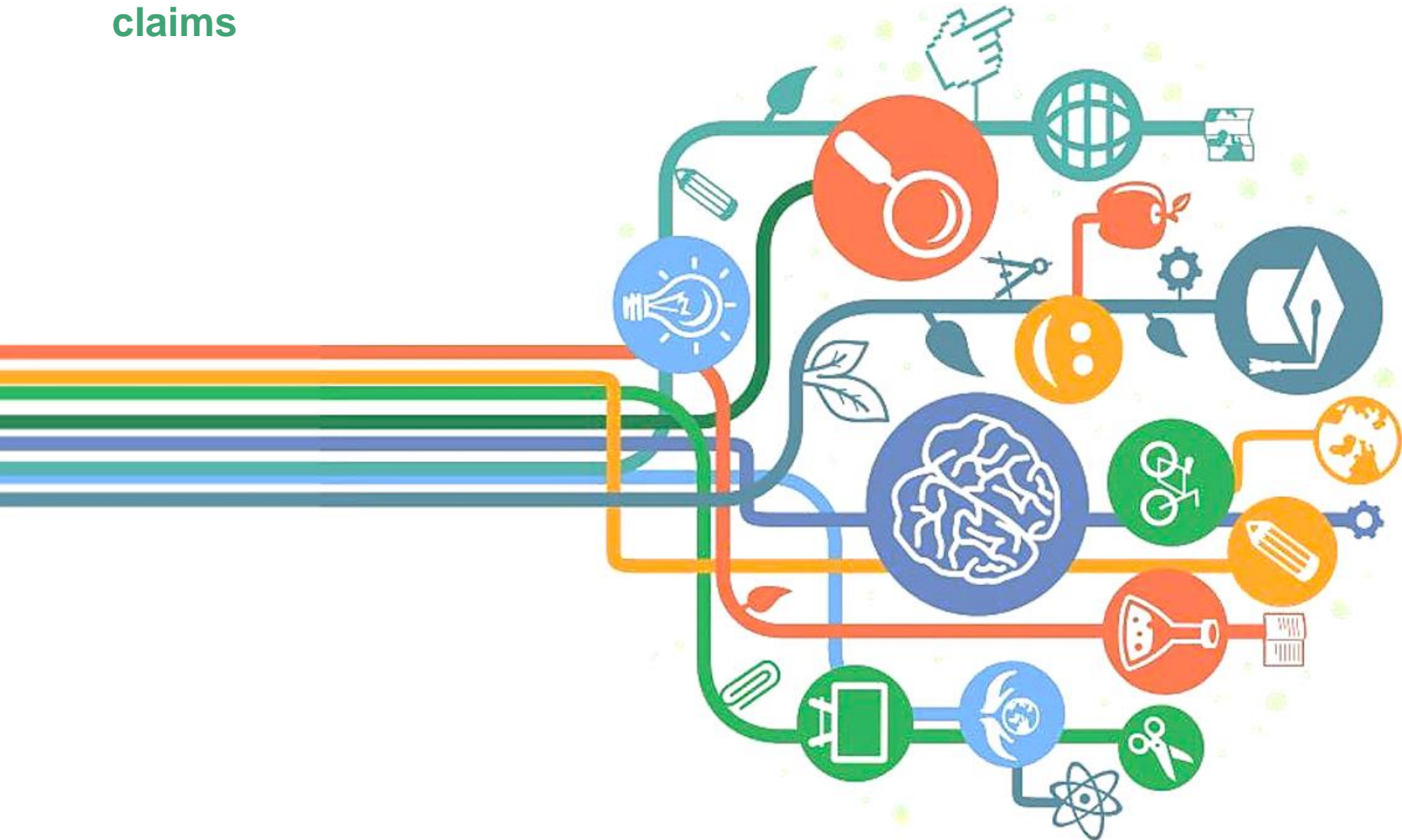
The team say, looking back at previous evidence we haven't been consistent – we need to connect across programmes, and measure over time with consistent core questions.

Use the right tools and expertise for good evidence



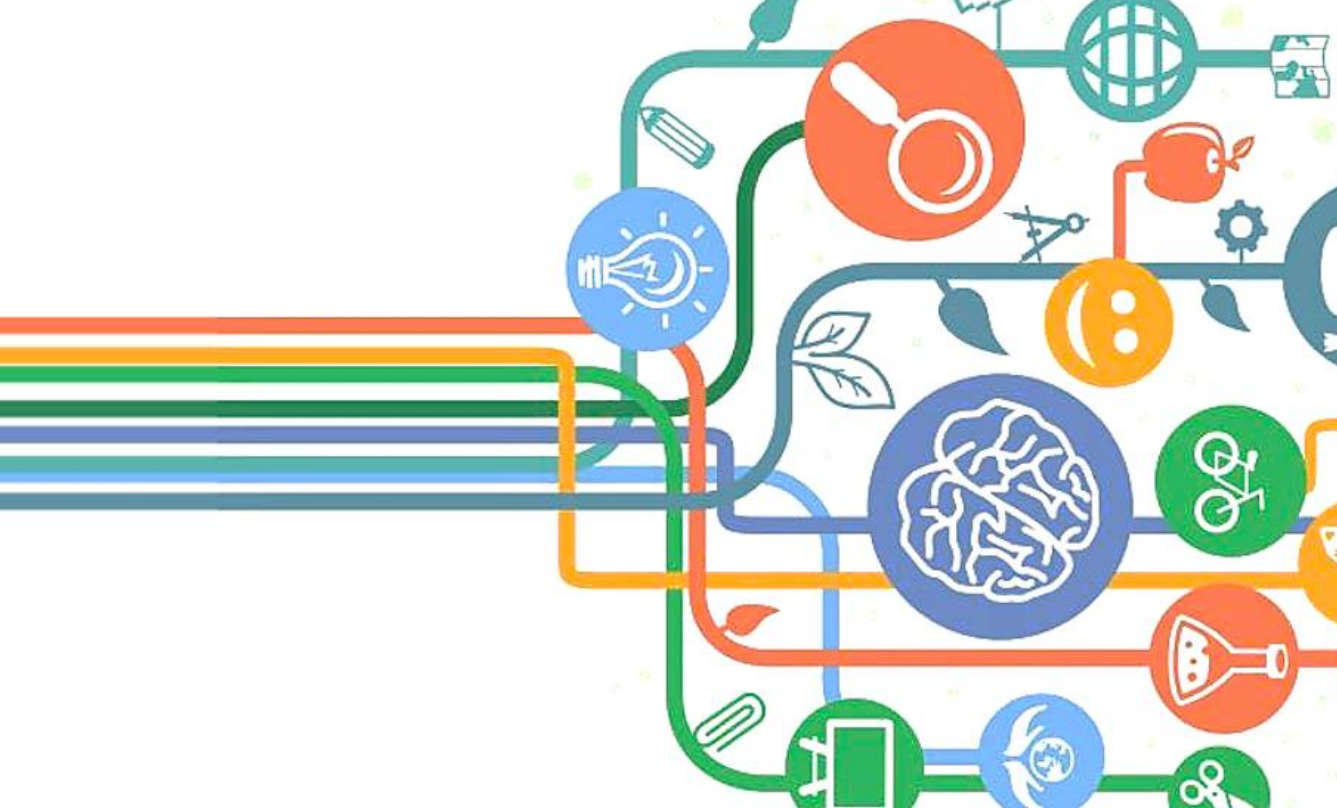
FINDINGS

Interpret the evidence and manage the data, for confidence about our claims



Feels more focused on social impact, but lots of lessons about lead-in time so evidence is embedded. "Culture Counts has stung us a bit."

claims



LEARNING

Fairly represent the people who matter and reach the people with power



LEARNING

Use the film as a medium to ask people for comment – more likely to get a response. Ask if there are any gaps and negative issues.

Fairly represent the people who matter and reach the people with power



IMPROVING

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



IMPROVING

Rigour and critique has been heightened 20-fold by this evaluation focus – other partners would be interested in this too. But needs care.

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





Culture³

Surgeries

- 3 March 1230
- 11 March 0930

Contact Mandy@MBAssociates.org

Using this resource

The resource can be used as in-depth or light touch guidance.

- It is for all creative and cultural practitioners and organisations, especially smaller organisations and those delivering socially-engaged arts.
- The overview is downloadable from <http://CultureCubed.org/> including:
 - About this resource
 - An introduction to Social Value
 - An overview of all the sections
 - All the Exercises
- The whole resource includes detailed support in each section and a real life case study from Folkestone Fringe. If you would like to use the whole resource or to discuss further support, contact us via CultureCubed.org or at info@MBAssociates.org
- You can follow a step by step process or dip in. We advise starting with the step by step sections, and referring back to the introduction for more guidance.
- There is also a simple 'put a toe in the water' option in each section.

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

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.

In detail, step by step

To work in-depth, we recommend following the step by step slides:

Scoping & planning

1. **Story of Change** - Have we agreed a Story of Change, so we are clear on the who, how, what and why of our service?
2. **Scope** – Is our evaluation scoped so it's fit for purpose, so it will 'speak' to the right people and is good ENOUGH?
3. **Review methods** – Have we reviewed existing methods and resources, so we are not re-inventing the wheel?

Evaluation Framework

4. **Key questions** – Have we agreed our key questions, so we are clear thinking and explicit about what we will learn?
5. **Framework** – Do we have an Evaluation Framework, so we are covering all and not more than we need.
6. **New methods** – What new methods are needed for extra evidence, so we are filling the gaps and keeping evidence current?

Gathering evidence

7. **Tool rules** – Do we understand some basic Tool Rules, so our approaches are robust?
8. **Holistic approaches** – Have we considered holistic approaches, so evaluation starts embedding into delivery?
9. **Menu of methods** – Is there a shared menu of methods, so we have diversity of approaches for enough information in the right style?

Analysing evidence

10. **Record-keeping** – Is record-keeping effective, so we can accredit and protect the data?
11. **Analysis** – Can we complete robust analysis, so we are confident when sharing learning?
12. **Adjustments** – Can we adjust claims for context and contribution, so we are not overclaiming and recognise partners?
13. **Valuation** – Should we use valuations, so we can compare the impact of outcomes and Social Value for Money (SVfM)?

Communicating learning

14. **Validation** – Has learning been validated by the people to whom it matters, so we are more confident and the unexpected is included?
15. **Recommendations** – Have we agreed, then shared recommendations, so we know how to make the biggest difference?
16. **Reporting** – Have we reported engagingly, so the right people can act on the learning?

Managing change

17. **Action** – Have we planned actions, so the learning will lead to improvement?
18. **Improvement** – How will we roll out improvements, so we are consistently getting better than before?

Key resources

Some simple resources support the process in this guide, and there are many other links in the guide itself

1. SCOPING & PLANNING

- 1 **Story of Change** Story of Change exercise
- 2 **Scope** Scope exercise
- 3 **Review methods** CORE questions

2. EVALUATION FRAMEWORK

- 4 **Key questions** Research question framework
- 5 **Framework** Evaluation Framework
- 6 **New methods** Evaluation Framework

3. Gathering evidence

- 7 **Tool rules** Tool rules checklist
- 8 **Holistic approaches** Holistic methods
- 9 **Menu of methods** Menu of methods

4. Analysing evidence

- 10 **Record-keeping** Plan record-keeping
- 11 **Analysis** Plan, record, and work through analysis
- 12 **Adjustments** Adjust for context and contribution
- 13 **Valuation** Value of Change delivery plan

5. Communicating learning

- 14 **Validation** Consultation checklist
- 15 **Recommendations** Prioritisation
- 16 **Reporting** Reporting decision chart

6. Managing change

- 17 **Action** Template action plan
- 18 **Improvement** The change curve

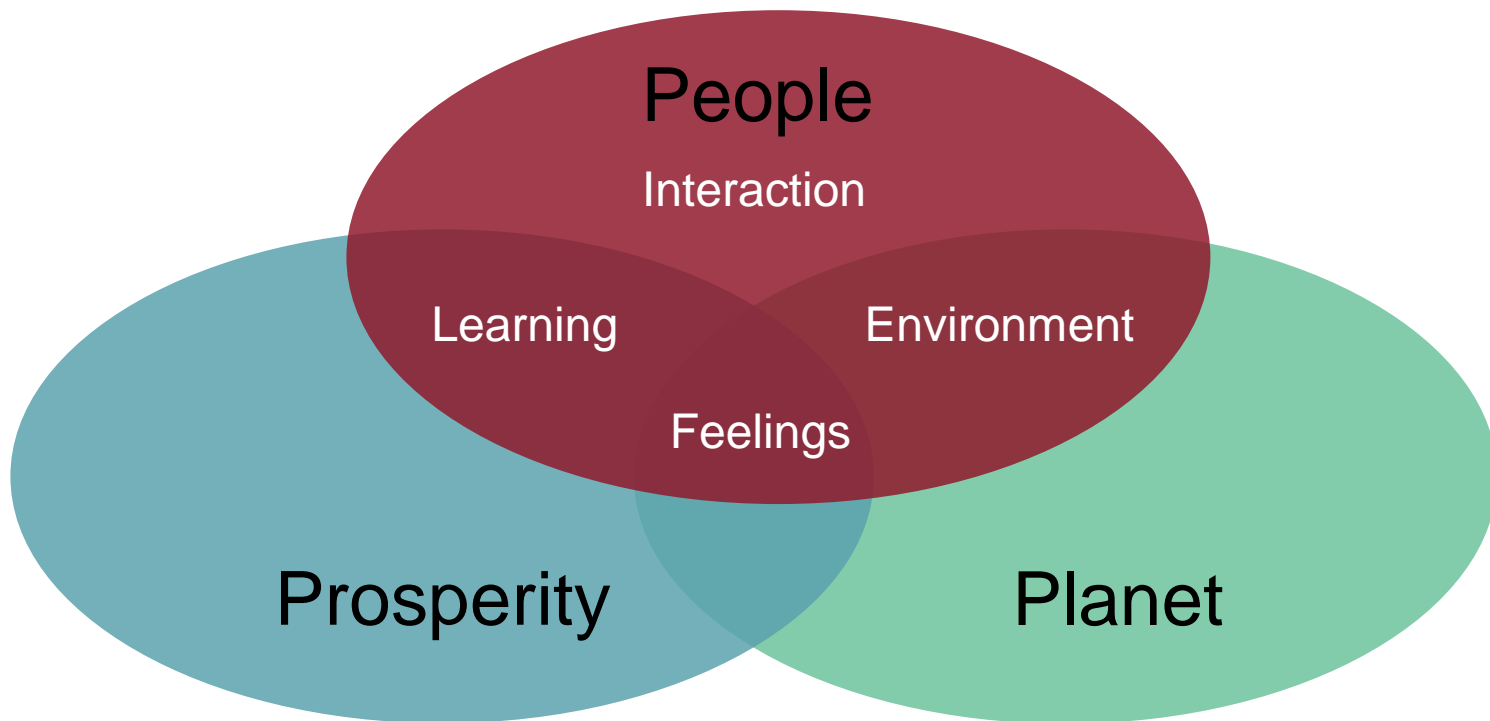
An introduction to social impact

Social impact is impact on society; a broad ‘societal’ approach to thinking about social, economic and environmental outcomes.

- In this guide we call these the 3Ps, People, Prosperity, and Planet (or Place).
- The unique contribution of creativity and culture is about people’s relationship with these 3Ps.

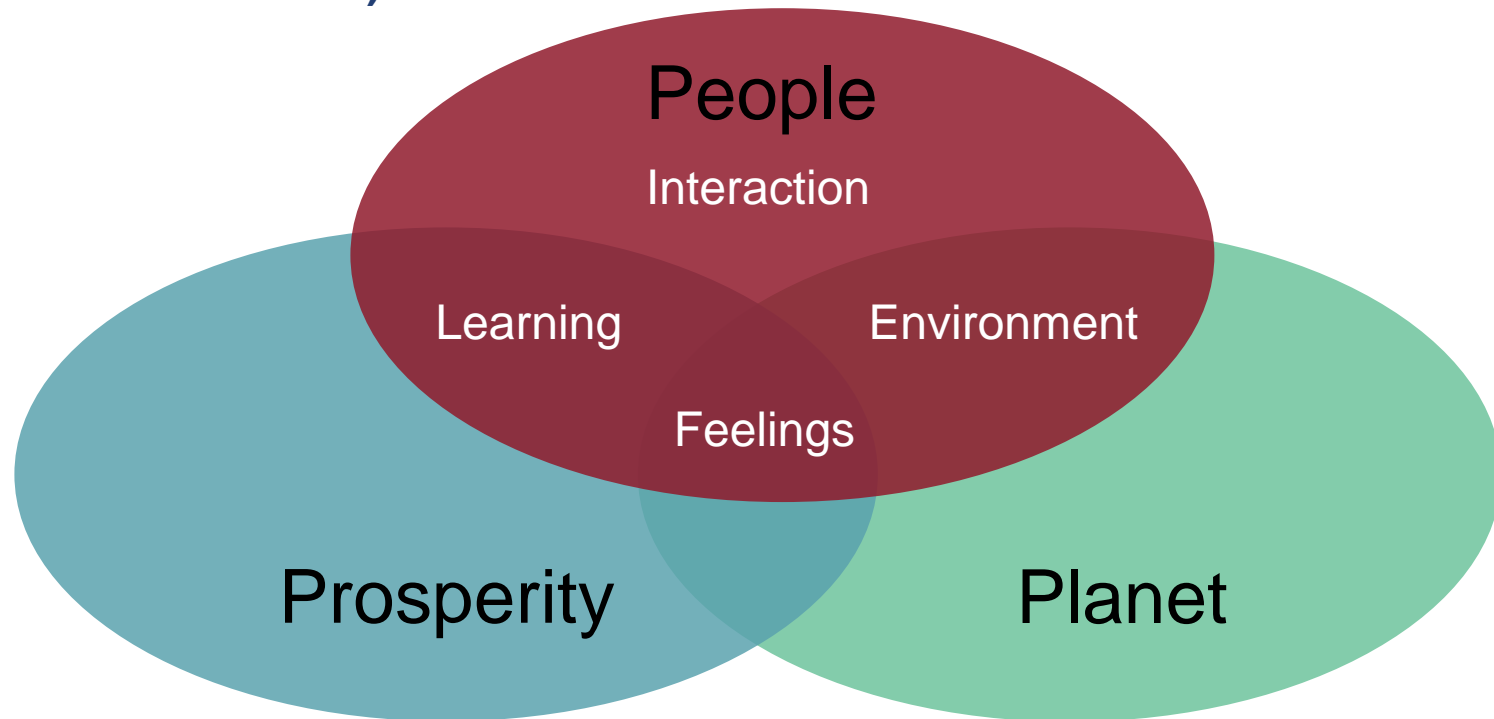
People, Prosperity and Planet

The 3Ps are inter-linked. They are central to social justice, our enjoyment of the world and our very survival.



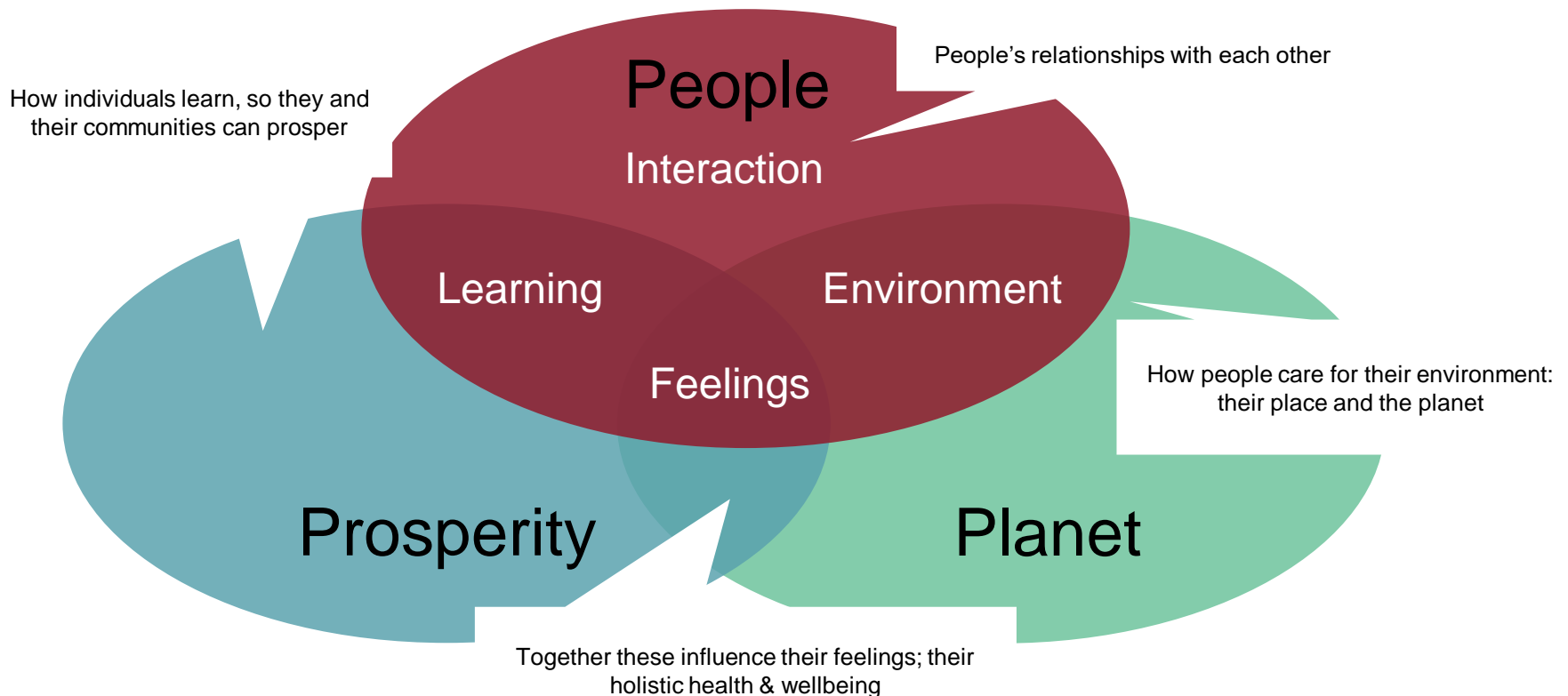
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Who pays for social impact?

Interest and investment in social impact is growing.

- Trusts and Foundations have funded based on social outcomes for many years – increasingly others are investing in the arts too including:
- Commissioners of Public Health services, but also more broadly - as the public sector is obliged through the Social Value Act (SVA) to consider social and environmental as well as financial value for money
- GPs in some areas around the country are engaged in social (or arts) prescribing
- Businesses, especially those that deliver in the public sector, want partners to help them meet SVA obligations, requirements by their investors, or increasing pressure from the buying public.

Learning, Interactions, Feelings, Environment

Cultural services can contribute to some big social and economic trends.

We can influence key drivers of prosperity, from our children's attainment to in-work or social productivity. Our interactions and relationships with each other are some of the highest valued of outcomes, in families, teams, communities and society as a whole. How we feel, sits at the heart of our wellbeing, influenced by our learning, interaction, and local and wider environment. From place-making to planet, creativity and culture affect how we interact with our environment, and arts organisations can lead the way.

Impact ranges from the individual, through relationships to wider community, city or even national and international outcomes.

A positive experience; an 'asset-based' approach and wellbeing

Unlike other services, the starting point for arts and culture is enjoyment rather than need. Involvement in 'the arts' is a common way to spend leisure time, alone and socially, and can be a natural way to get people to engage and increase wellbeing.

From the self-evident benefits of dance on physical health, to the psychological benefits of crafts or music on wellbeing (being in 'flow'), *feeling good* is the bread and butter of creativity and culture. And feeling good does good. Wellbeing is [described as a pleasant, good, or meaningful life](#), the latter being about the 'agency' that enables people to make a difference to their lives and others.

Commissioning, social prescribing and productivity

Encounters that are not based on intellect are especially good at reaching the most vulnerable; such as, small children, non-English speakers, or people with dementia. They can make a difference, including resulting in '[social productivity](#)' in which people look after themselves so the state doesn't need to. This can one of the most

tangible ways to evaluate impact; by assessing a reduction in demand on the public purse. In the workplace, for example, creative input that leads to personal health *and* team productivity (affecting profit and the wider economy) can be a win-win for all.

Place-making to planet

Creative or cultural towns are significant in making somewhere 'liveable' and in attracting, and retaining, a local workforce – witness our [Cities of Culture](#). Cultural organisations can contribute to a virtuous circle which affects behaviour and attitudes as well as contributing volunteer and visitor value directly. And from local littering, to climate change and war, environmental themes big and small are our legitimate subject matter.

Fit for the future

GDP is a flawed measure of success, based on economic growth which is unsustainable, and fails to recognise inequality. New and sustainable economics-of-equality, what we might call *Equanomics* are being considered by organisations, such as, the [New Economics Foundation](#), [Centre for Understanding Sustainable Prosperity](#), the [Wellbeing Economics Alliance](#) and authors of this resource. [Doughnut Economics](#) also explores these ideas.

The ability of creativity and culture to help people imagine how others might feel, to promote a sustainable future, and fit with this equanomics way of thinking, is very valuable.

Learning and skills

We can influence key drivers of prosperity, from our children's attainment, through lifelong learning to in-work or social productivity. Outcomes include:

- Qualifications
- Getting a job
- Volunteering contribution
- Business attraction and workforce retention
- Contribution to the visitor economy
- Reduced demands on the public purse



- Self-confidence
- Aspiration
- Civic responsibility
- Life skills
- Creative skills
- Academic skills
- Knowing how to look after myself

Interaction and relationships

Our relationships with each other are some of the highest valued of outcomes, in families, teams, communities and society as a whole. Outcomes include:

- Creating safe spaces
- Creating places for families to be
- Caring for vulnerable people
- Reducing loneliness
- Teamworking, productivity & profit



- Respect for others
- Being proud of someone close
- Team-building
- Customer care
- Relationships within or between communities
- Emotional intelligence
- Empathy
- Communication skills
- Understanding diversity
- Conflict resolution

Feelings

How we feel sits at the heart of our wellbeing, influenced by our learning, interactions and local and wider environment. Outcomes include:

- Being more active and engaged
- Services suitable for 'social prescribing'
- Being more interested in other things or people



- Feeling happy or satisfied
- Feeling worthwhile
- Self-confidence and optimism
- Feeling relaxed or energetic
- Being absorbed or in 'flow'
- Being able to understand
- Being understood
- Problem-solving

Environment

From place-making to planet, creativity and culture affect how we interact with our environment and arts organisations can lead the way. As well as thinking about natural resources as an investment, outcomes include:

- Interpreting or hosting discussion about...
- Civic responsibility and policies about:
 - Resource depletion
 - Environmental damage and pollution
 - Climate Change
 - Extinction
- Reducing our own environmental impact



- Raising audiences' awareness and motivation to address:
 - Resource depletion
 - Environmental damage and pollution
 - Climate Change
 - Extinction
- Sharing the implications of:
 - Resource depletion
 - Environmental damage and pollution
 - Climate Change
 - Extinction

Helping people to make a difference

Addressing people's relationships with Learning, Interactions, Feelings and Environment enhances their ability to make a difference

- To act positively people need to feel they can make a difference, to be invested in the issue, to have personal 'agency'.
- The Arts is one of few areas where in-depth discussion of big issues can take place – they can raise awareness and tackle stigma.
- In wellbeing terms, functioning sits alongside feelings - in a world of smaller public budgets, helping people to help themselves is the future.
- ONS measures of voter turnout and trust in Government are decreasing.
- The arts delivers well against the EAST framework of behavioural insights, that things must be Easy, Attractive, Social and Timely to gain traction.

Learning to manage Social Impact

But we are not just interested in the outcomes if we are to manage our impact. We also need to know:

- **Who was involved?** So that our audience, participants, volunteers and staff are at best redressing inequality, and at least representative of our population, or targeting under-represented areas
- **What difference did we make for them?** Answering why we are doing it, by creating better outcomes related to other People, Prosperity and Planet, both in their feelings and functioning
- **How much was invested?** So we know if we created Social Value for Money (SVfM)
- **What was it that made the difference?** So we can do it again but better

Research sources

Information about social impact is under continuous review by many. Here are some useful places to look.

- The Arts Council's [research and data](#) section, [CultureCase](#), from Kings College London, [Julie's Bicycle](#) and [Culture Action Europe](#)
- [Inspiring Impact](#), support from a group of non-profit expert organisations
- [Social Value UK](#), a membership network which shares guidance
- The [Office of National Statistics](#), where you can sign up to excellent email bulletins and Social Value Act [information and resources](#) from the Cabinet Office

It's about how, not what we do

Many frameworks, methods or tools can help demonstrate social value, it is how they are used that matters:

**Social Return
On Investment
(SROI)**

**Contingent
valuation
methods**

**Subjective
Wellbeing
Valuation**

**Interactive
methods**

**Multi-Criteria
Analysis**

**Cost-Benefit
Analysis**

Surveys

Outcomes Star

**Most Significant
Change**

**Ethnographic
Evaluation**

**Social Media
analysis**

Relevant data

Several organisations are grouping data relevant to key themes which may helps us speak to a wider audience.

Theme	Data	From
Creative and cultural wellbeing	LIFE - Learning, Interaction, Feelings Environment	Introduced in this resource
Place-making	<u>Thriving Places Index</u>	Happy City
Community wellbeing	<u>Community Wellbeing Index</u>	The Young Foundation
Public sector procurement	<u>TOMs - Themes, Outcomes, Measures</u>	Social Value Portal
Sustainable Development Goals	<u>Sustainable Development Goals</u>	United Nations
National consistency in definitions and survey questions	<u>Harmonised Principles</u>	HM Government

Key in starting to manage social value is to ask ourselves...

‘So what?’ Are we really making a difference to

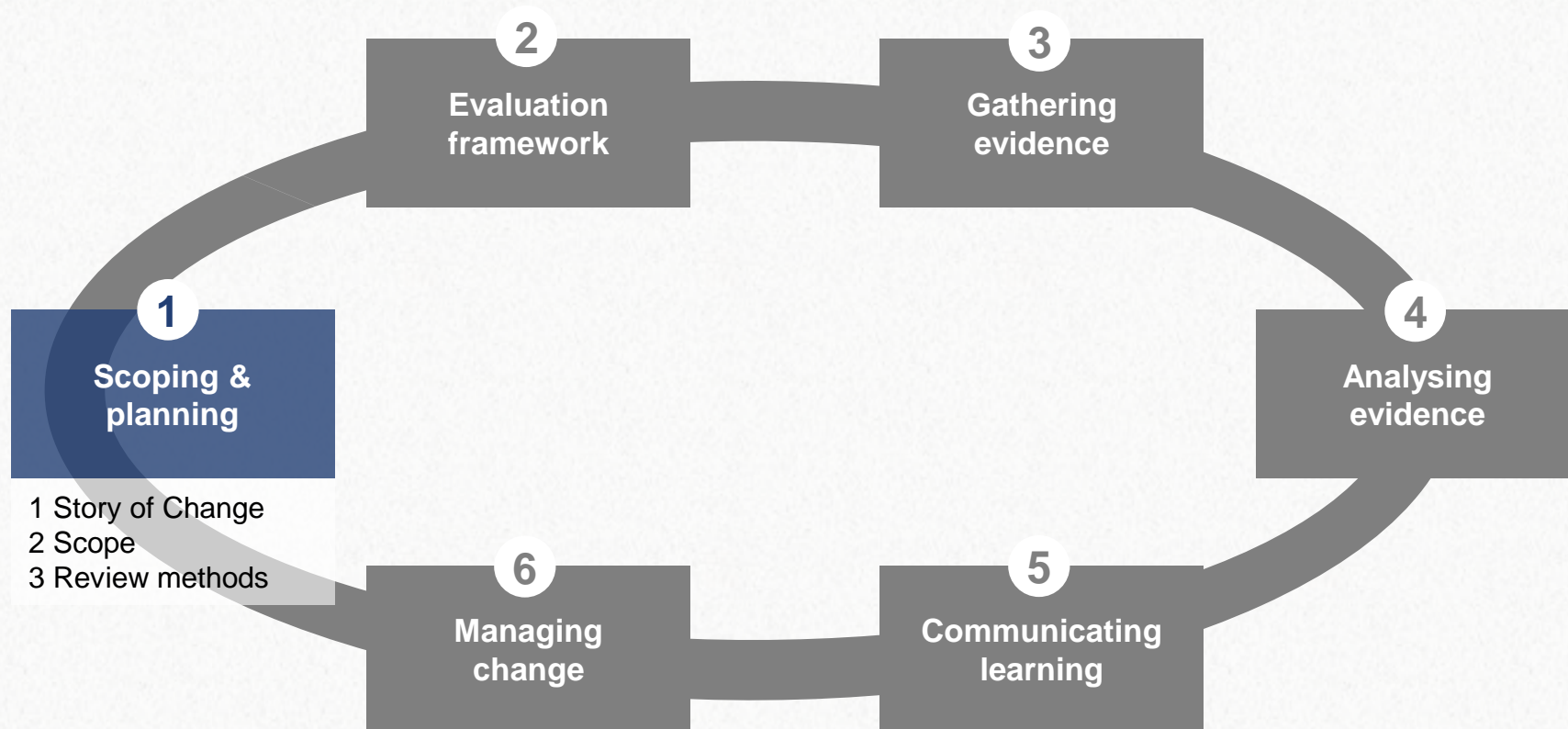
- People,
- Prosperity or
- Planet?



1 Scoping & planning

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

Scoping & planning



PLANNING

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



Scoping & planning

For a toe in the water In detail, step by step Purpose Key steps Key resources

1 Story of Change

Decide what *difference* you want to make with your service and to whom.

Have we agreed a Story of Change,

so we are clear on the who, how, what and why of our service?

1. Work on each element in turn.
2. Ask yourself, who, how, what and why?
3. Check the logic - the chain of events.
4. Review tips.

Story of Change exercise

2 Scope

Decide who your evaluation is for and what will convince them.

Is our evaluation scoped so it's fit for purpose,

so it will 'speak' to the right people and is good ENOUGH?

1. Ask who and what the evaluation is for.
2. Agree the principles.
3. Consider the wider scope.

Scope exercise

3 Review methods

Re-read previous evaluations.

Have we reviewed existing methods and resources,

so we are not re-inventing the wheel?

1. Identify available resources.
2. Assess against the Story of Change.
3. Decide which resources can work.

CORE questions

Scoping and planning

Create a Story of Change with outcomes linked to delivery; plan evaluation fit for people and purpose, including what's gone before

Evaluation is often only considered at the end of a period of delivery. We recommend that it is part of the planning before delivery begins, and that *real time* is invested.

There are three parts in this section: creating a Story (or Theory) of Change, writing a scoping document; clarifying who the evaluation is for and how it will be delivered, and reviewing what information we already have or can easily get.

A Story of Change is a shared, logical plan (or review) of the difference we want to make with our project or service and how – the *why*, *who*, *what* and *how* of the project or service. It ensures we focus on making a difference (and not just on what's being delivered) and ideally should be created with the people who it is about; the people who matter.

At the same time we need to properly **scope the evaluation** itself (whereas the Story of Change is about the service delivery). A scoping document should identify who the evaluation is for, and therefore what form it should take, so that it speaks *their* language. Historically there has been a habit of seeing evaluation as a form of *PR* but increasingly there is an appetite from organisations and investors to learn and an enquiring, holistic and bespoke approach is often the way we can do that.

Scoping decisions are likely though to include a trade-off between what's perfect and what works. We know evaluation needs to be good, but it really only needs to be good ENOUGH.

A review of existing resources including evaluations, data and existing approaches takes some time but will begin to set a tone in which evaluation is more appreciated because it is genuinely useful. We don't always need to gather new information, sometimes we or others, may have very convincing evidence relevant to us. We also want to make sure that the approaches we are putting in place make best use of things we are already doing, like using enrolment forms to collect a baseline.

Recommended: Write a scope for your evaluation and a Story of Change with key stakeholders about your service. Review existing evidence resources, all before putting new plans in place.

But to just ***put a toe in the water*** in each of these sections, take thirty minutes to:

1. **Decide what difference you want to make with your service and to whom.**
2. **Decide who your evaluation is for and what information and type of report will convince them.**
3. **Re-read previous evaluations.**

2

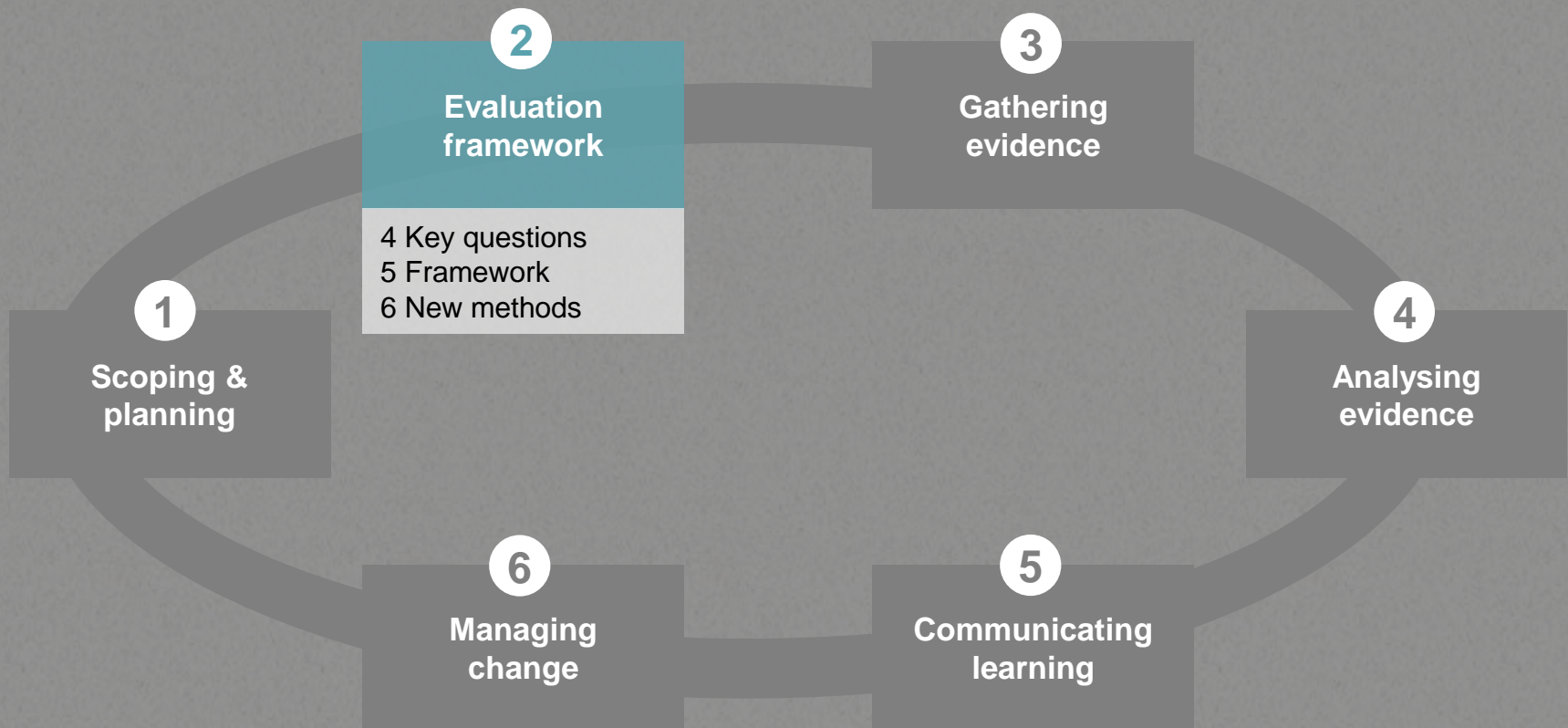
Evaluation Framework

4 Key questions

5 Framework

6 New methods

Evaluation Framework



PREPARATION

- Prepare by not re-inventing the wheel and considering what is CORE, Convincing, On message, Realistic and Enough



Evaluation Framework

For a toe in the water

In detail, step by step

Purpose

Key steps

Key resources

4 Key questions

Decide two or three questions that describe what you want to find out.

Have we agreed our key questions,

So we are clear thinking and explicit about what we will learn?

1. Write research questions.
2. Ask, "what works?" What made the difference?
3. Write survey questions.
4. Establish indicators.

[Research question framework](#)

5 Framework

Cross check your Story of Change against your evidence plans.

Do we have an Evaluation Framework,

So we are covering all and not more than we need.

1. Combine the Story of Change with available evidence.
2. Identify the gaps and reduce the overlaps.
3. Add key questions.

[Evaluation Framework](#)

6 New methods

Check your evidence will answer your key questions.

What new methods are needed for extra evidence.

So we are filling the gaps and keeping evidence current?

1. Clarify where we need new methods.

[Evaluation Framework](#)

Evaluation Framework

Build the Story of Change into an Evaluation Framework by agreeing key questions and combining with existing and new evaluation resources

Taking a thoughtful and holistic approach to conversations about evaluation helps reduce duplication and keep the evaluation on track and focused. The Evaluation Framework combines the Story of Change with evidence resources to ensure important features are examined, unnecessary evidence is reduced, and each stakeholder's needs are met.

There are three parts to this stage: identifying key questions, joining these resources with the Story of Change and thinking about where new methods are needed.

To keep things clear and consistent, it helps to establish **two sets of key questions; our research questions and our survey questions**. It also helps to clarify **indicators of change** that might be observable behaviours or facts. The research questions are the fundamental things we want to find out by doing the evaluation; about People, Prosperity and Planet. They should include things like who was involved and what did it cost? The cost will not just be financial; to understand the investment of essential skills or commitments is key to what makes culture special. And we need to consider overheads as well as budgets if we are to properly price a contract or commission. Finally, finding out about who took part – who delivered and received the service – focuses on one of the biggest challenges in the cultural sector, a lack of all kinds of diversity.

For our survey questions, it helps to have a consistent way of asking people directly so that responses can be compared and indicators will help us to identify tangible demonstration of change.

Creating one holistic **Evaluation Framework** draws all these things together into a table with the Story of Change. Cross checking which resources inform different elements of the Story of Change minimises the need for new evidence, helps us to meet the needs of investors and others by clearly evidencing different elements of our Story of Change, and helps us identify what **new methods** we need to use.

The type of tools we might use (as distinct from the questions they ask) is covered in the next section.

Recommended: Create an Evaluation Framework as a table combining the Story of Change with existing (and then new) evidence resources.

But to just **put a toe in the water** in each of these sections, take thirty minutes to:

1. **Decide two or three key questions that clarify what you want to find out.**
2. **Cross check your Story of Change against your evidence plans.**
3. **Check that the evidence you are collecting will answer your key questions.**

3

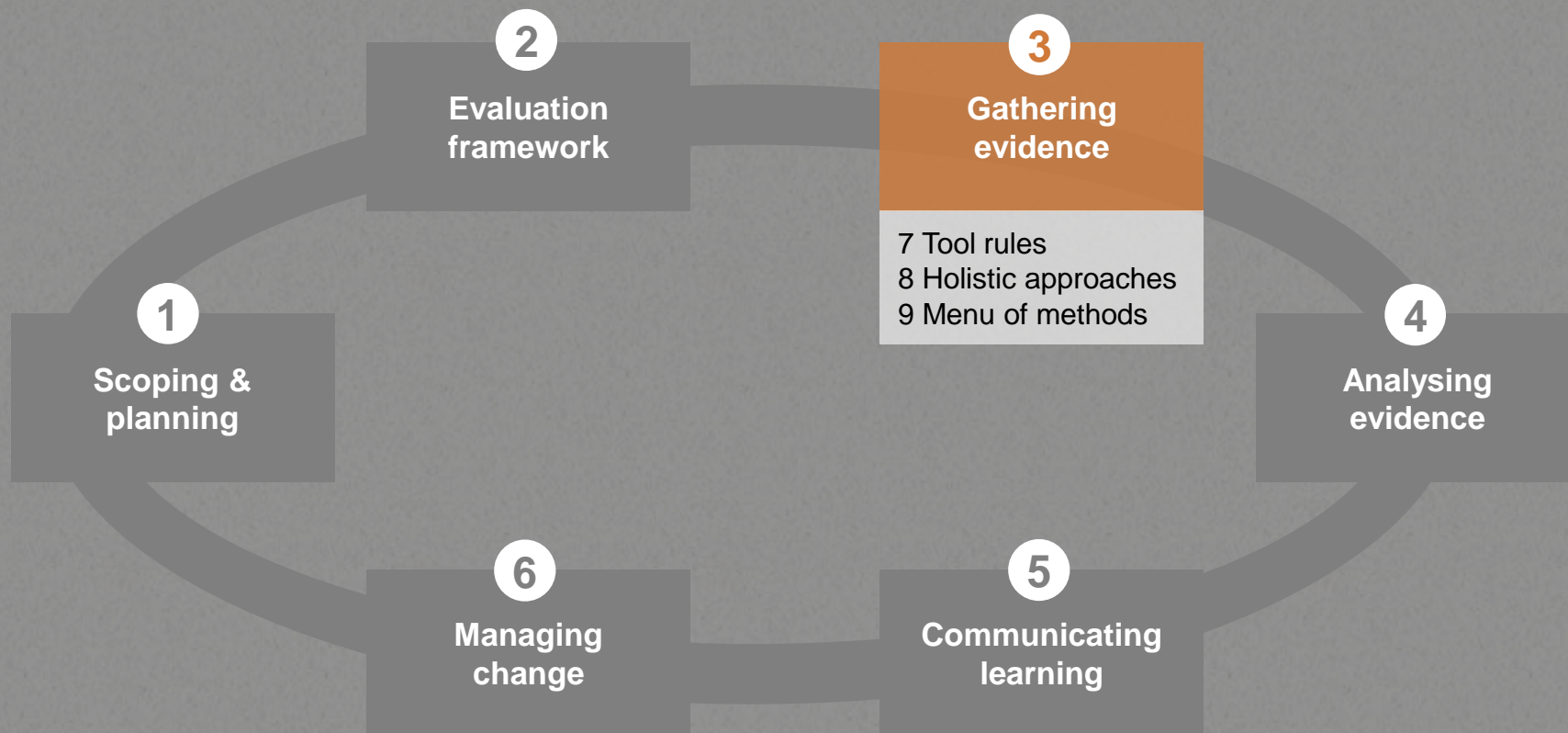
Gathering evidence

7 Tool rules

8 Holistic approaches

9 Menu of methods

Gathering evidence



EVIDENCE

Collect the right tools and expertise for good evidence, not letting perfection get in the way of progress



Communicating learning

For a toe in the water

In detail, step by step

Purpose

Key steps

Key resources

7 Tool rules

Try to collect 'baseline' information and avoid leading questions.

Do we understand some basic Tool Rules,

so our approaches are robust?

1. Consider evidence collection against a checklist of Tool Rules.

Tool rules checklist

8 Holistic approaches

Embed evidence collection in delivery where possible.

Have we considered holistic approaches,

so evaluation starts embedding into delivery?

1. Consider holistic methods.

Holistic methods

9 Menu of methods

Use methods for open questions (narrative) and closed questions (numbers).

Is there a shared menu of methods,

so we have diversity of approaches for enough information in the right style?

1. Using our research questions, complete evidence plans
2. Ensure variety within a menu
3. Check again on decisions; are they convincing, on-message, realistic and enough?

Menu of Methods

Gathering evidence

Plan evidence for subjective and objective outcomes data, an exploration of what works and delivery issues like investment and participation

New evidence needs to illustrate any changes to outcomes – both positive and negative - and to find out what has worked. The need to be robust in both planning and delivery. We suggest considering holistic embedded approaches first, then creating a menu of methods or tools including three different approaches: stakeholders' own views, objective 'facts', and the views of others. A range of approaches will help to check the validity of findings and allows us to select tools that feel right for the people involved. As well as evidence for outcomes and 'what works' there are some delivery essentials we should always collect; who was involved and what did it cost.

There are three parts to this section: It helps to plan using some 'tool rules' to avoid common pitfalls. We have collated a range of tools that have been developed with cultural organisations or are well evidenced methods from different sectors. We also include some more holistic approaches that can easily become embedded.

It is useful to stick to some **tool rules**, that help us set up, collect and plan more robustly; a range of tips and reminders, like collecting baselines, thinking about the order of questions, planning 'open' or 'closed' questions that don't 'lead' the respondent, and learning how to use samples more robustly.

There are **some methods that feel more holistic and link more closely to delivery**, for example our Plan Do Review approach

which can work well for multiple projects.

The **menu** of approaches we select could usefully include three types of tools, 'own view', 'others view' and 'facts', and both creative, interactive approaches and more academic methods, depending upon our scoping.

Recommended: Share tool rules with staff, and select tools for before and after evidence: for example, national survey questions and/or a creative self assessment, observations and/or narrative, some objective 'facts' showing what happens. Collect basic information about cost and participation. For programmes (that is multiple projects) use the Plan Do Review approach.

But to just **put a toe in the water** in each of these sections, take thirty minutes to:

1. **Do your best to collect baseline data of some kind and avoid leading questions.**
2. **Embed evidence collection in delivery where possible.**
3. **Use methods for open questions (narrative) and closed questions (numbers).**

4

Analysing evidence

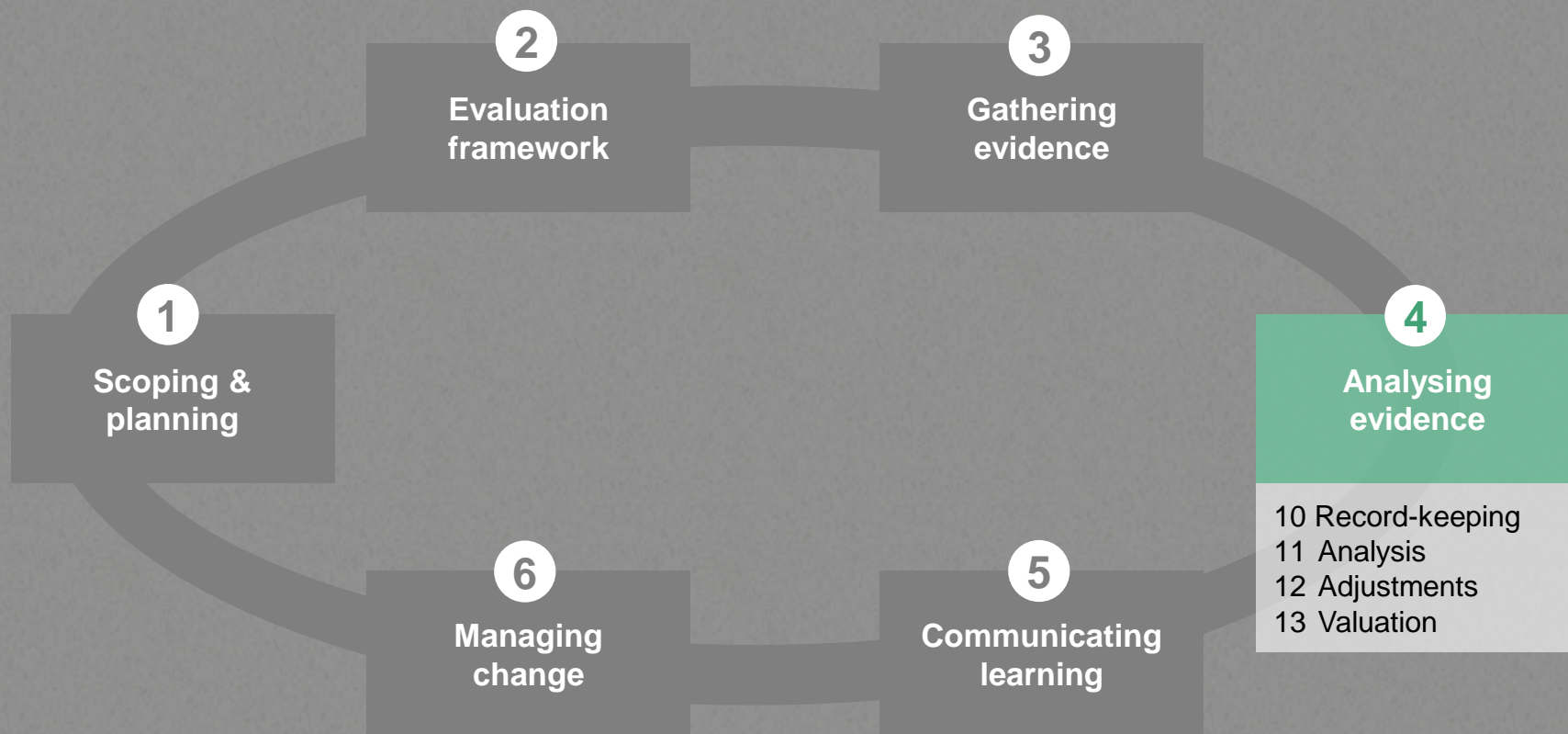
10 Record-keeping

11 Analysis

12 Adjustments

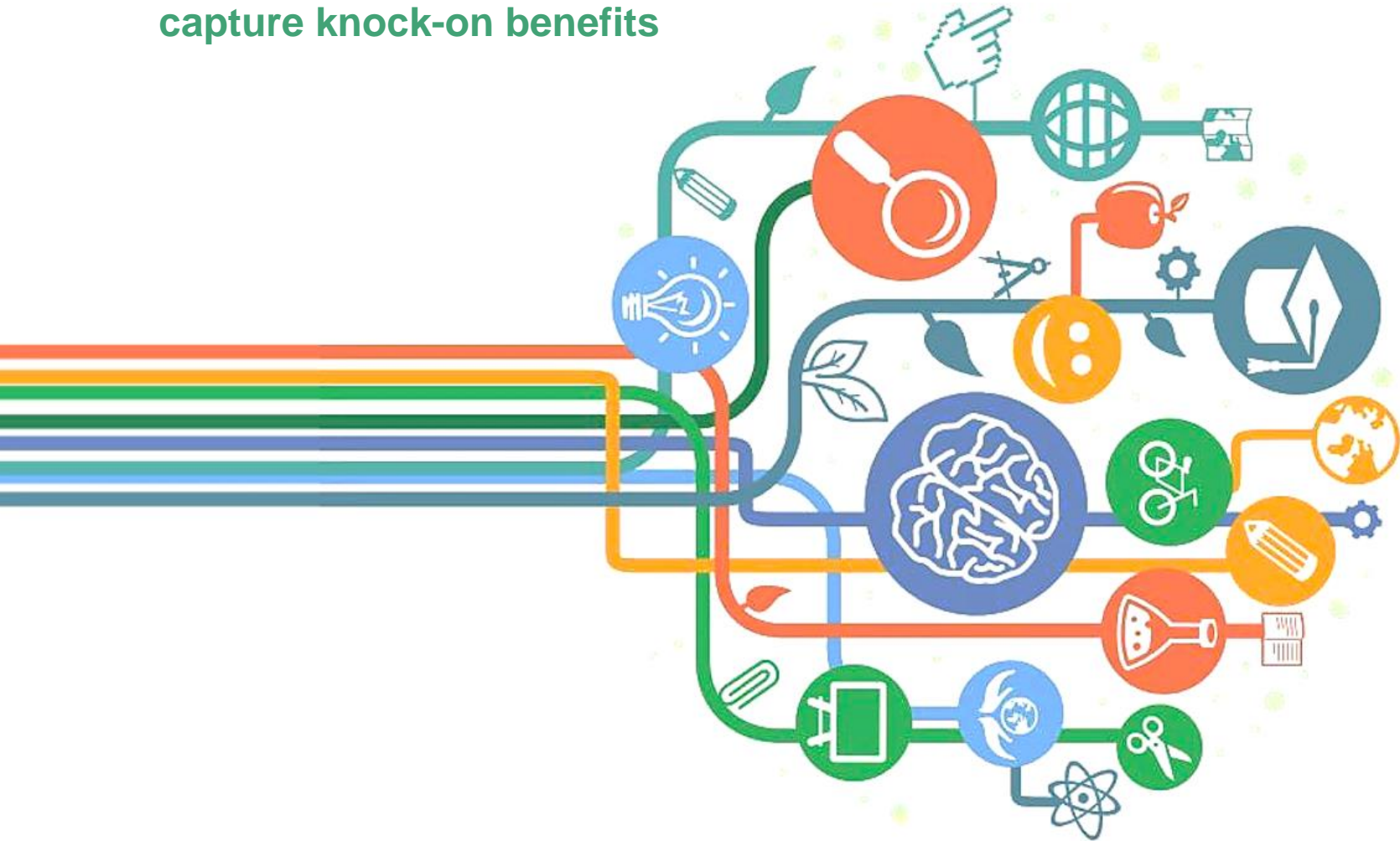
13 Valuation

Communicating learning



FINDINGS

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



Analysing evidence

For a toe in the water	In detail, step by step	Purpose	Key steps	Key resources
10 Record-keeping				
Keep data in one place and follow GDPR principles.	Is record-keeping effective,	so we can accredit and protect the data?	1. Plan record-keeping and organise data	Plan record-keeping
11 Analysis				
Combine some numbers with some narrative for a more complete story.	Can we complete robust analysis,	so we are confident when sharing learning?	1. Plan analysis using the scope 2. Work through all the data to <ul style="list-style-type: none"> Assess who was involved and their views Assess the difference we've made Assess what made the difference 	Plan, record, and work through analysis
12 Adjustments				
Ask people 'what would have happened anyway?'	Can we adjust claims for context and contribution,	so we are not overclaiming and recognise partners?	1. Assess what would or could have happened anyway 2. Assess what also contributed	Adjust for context and contribution
13 Valuation				
Consult to prioritise outcomes and consider what else could have been funded.	Should we use valuations,	so we can compare the impact of outcomes and Social Value for Money (SVfM)?	1. Consider pros and cons and methods 2. Prioritise outcomes, or apply valuations 3. Consider Social Value for Money (SVfM)	Value of Change delivery plan

Analysing evidence

Analyse evidence using numbers and narrative and establish what works, adjust claims for context and contribution and apply values.

There are many approaches to learning from data that the non specialist can use, from narrative theming to statistical analysis which can be automated in spreadsheets. We need some basic analytical skills and also to take care not to overclaim our impacts. And, to establish social value for money, we need to be able to value the 'return' to compare with the investment.

There are four parts to this section: good record-keeping and organisation, some analysis methods, adjusting for context and contribution, and thinking about the relative values of different outcomes to allow us to compare.

Good record-keeping such as attributing findings to the source and data storage is important for ethical and security reasons.

Many cultural evaluations will want to start **analysis** by looking at narrative or in-depth assessment of a few results, rather than numeric analysis, of many. We need to resist just having one perspective, and look for commonalities or get more people's inputs. Numeric analysis may include averages, distributions, correlations or statistical significance depending on our scope. We must beware of making spurious claims, be transparent and validate our findings.

We need to be careful about the results we claim. The local context may have offered other opportunities that we've just displaced so there's no new social value (value to society), and people may have been on a positive trajectory anyway. At the

same time other things go on in people's lives to which changes could be attributed. So we **adjust for context and contribution**.

A more sophisticated social value analysis may want to apply real or 'proxy' **values** to the outcomes. Some see this 'monetisation' to be dumbing down - we see it as allowing sometimes less tangible results onto a level playing field with economic returns. It also has management potential, better informing us what to prioritise.

Recommended: Store data appropriately. Analyse before and after data for as many stakeholders as possible looking at the distribution of results. Analyse narrative using theming. Consider what is proportionate in adjusting for context and contribution and consider valuing outcomes.

But to just **put a toe in the water** in each of these sections, take thirty minutes to:

1. **Keep data in one place and follow GDPR principles.**
2. **Combine numbers with narrative.**
3. **Ask what would have happened anyway?**
4. **Prioritise; consider which is the one outcome to rule them all.**

5

Communicating Learning

14 Validation

15 Recommendations

16 Reporting

Communicating learning



LEARNING

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



Communicating learning

For a toe in the water In detail, step by step Purpose Key steps Key resources

14 Validation

Check your draft with the people to whom it matters	Has learning been validated by the people who know,	so we are more confident and the unexpected is included?	1. Consult on draft with relevant people 2. Consider more formal verification	Consultation checklist
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15 Recommendations

Conclude with a recommendation for what happens next time	Have we agreed, then shared recommendations,	so we know how to make the biggest difference?	3. Consult on recommendations with relevant people	Prioritisation
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16 Reporting

Share a summary with the people identified in your scope	Have we reported engagingly,	so the right people can act on the learning?	4. Plan report as it was scoped 5. Use the right medium for the occasion	Reporting decision chart
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Communicating Learning

Ask stakeholders to ‘validate’ results and agree recommendations, and report in a way that is accessible to the audience

Evaluations need to show they are independent from the people they are reviewing, but they also need a reality test to make sure they reflect the true picture. Their value in terms of social impact is to allow impact messages to be spread, but also to recommend future improvements. Either way, the way we report needs to be accessible, timely and clear.

There are three parts to this section: guidance on validating results with the people who know, making sure that learning leads to shared recommendations for improvement and reporting in an engaging way.

We shouldn’t make claims about people without asking them if they agree. **Validation** needs to be appropriate without over-burdening people and we need to make sure they can be honest. It should not be left too late, or we may be wedded to the conclusions we’ve drawn. If feedback does not fit with the evidence, either dig for deeper learning, or challenge preconceptions with the evidence.

Recommendations need to be drawn from the evaluation. Some recommendations are for others and may feel too ambitious, but should still be made with an attempt to break them down into steps that are realistic, within our control, and ideally with responsibility and a timescale attached.

There are many different ways to report, including video, animation, slides and publications. How our reporting takes shape should be indicated from the scoping stage. It is important to include statements about assumptions and sample sizes for transparency.

Recommended: Have a systematic process of checking findings with the people they are about before reporting and agree recommendations with them. Write a report (in whatever medium) that ‘speaks’ to the scoped audience for the evaluation.

To just *put a toe in the water* in each of these sections, take thirty minutes to:

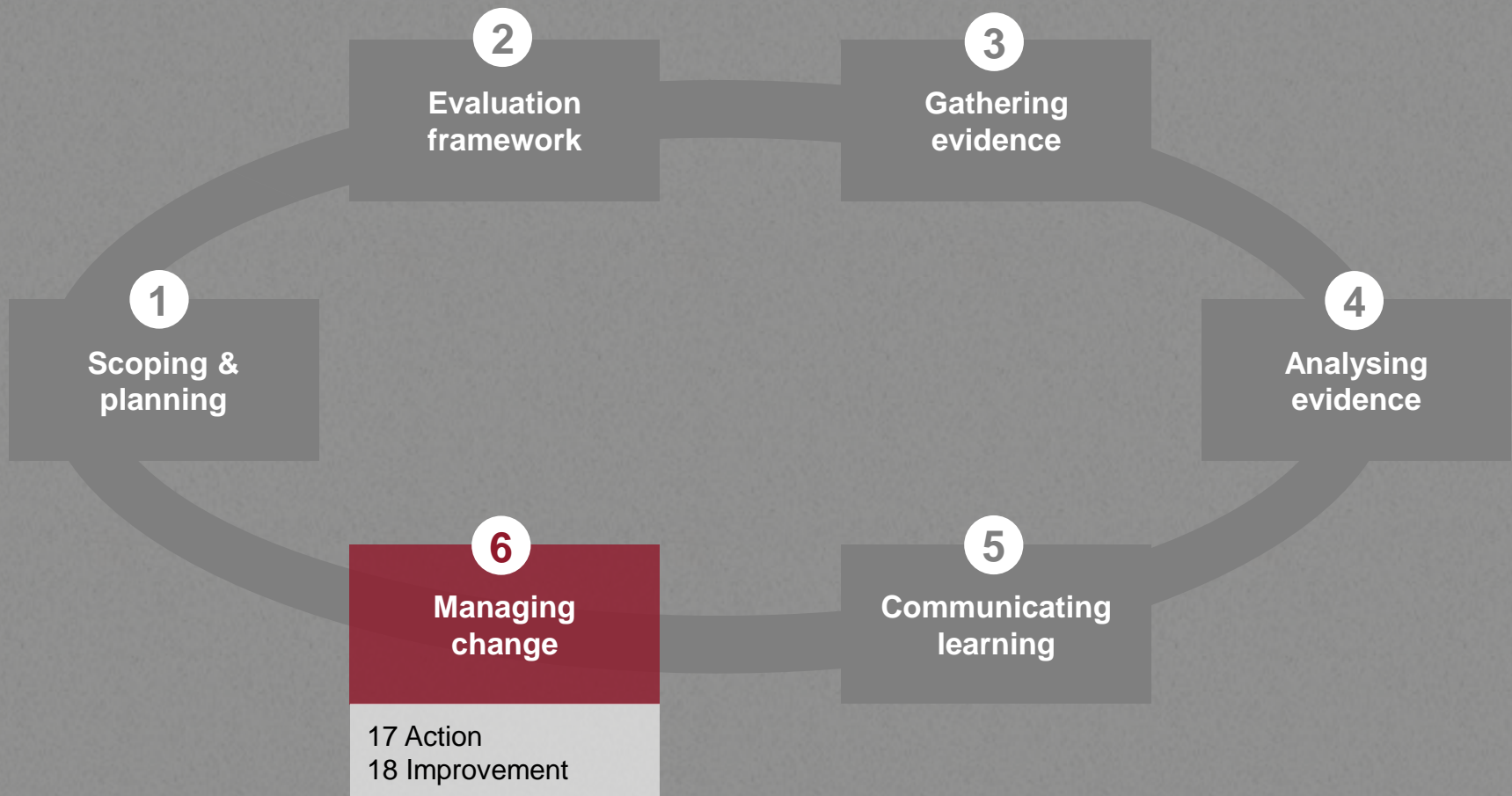
1. Check your draft with the people it’s discussing
2. Conclude with a recommendation for what happens next time
3. Share a summary with the people identified in your scope

6 Managing change

17 Action

18 Improvement

Managing change



IMPROVING

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



Managing change

For a toe in the water In detail, step by step Purpose Key steps Key resources

17 Action

Use your normal planning processes to schedule action on recommendations.	Have we planned actions,	so the learning will lead to improvement?	1. Schedule actions and responsibilities	Template action plan
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18 Improvement

Think about heads, hearts and minds when planning action on recommendations.	How will we roll out improvements,	so we are consistently getting better than before?	1. Manage improvements using heads, hearts and minds	The change curve
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Managing Change

Plan actions and roll out improvements so the next project builds on learning from the first

Managing social impact is a cycle where learning feeds back into improvement. Changes need managing, or things are likely to slip back. We need to consider heads, hearts and minds (or rational, emotional and political) motivations.

There are two parts to this section: planning actions and rolling out improvements.

Whilst suggesting we **plan actions** may not be very original, it is nonetheless worth a reminder – we won't be able to make a bigger difference unless we act on learning. Actions are unlikely to happen without a named person being responsible and a deadline or series of incremental steps. We know that implementing change may well mean things get worse before they get better, so it might be helpful to work within a framework that reminds us of the ongoing plan-do-review cycle, or the repeated broadening and focusing of the double diamond approach. And a simple tip from marketing expertise is to limit how much innovation we make at a time, for example try something new with an existing audience, or a new audience with something we know works, but not a new service and new audience together.

Rolling out **improvements** will be about keeping these actions going, so we get past the point where things are messy and

difficult, and into embedded better practice. To make sure individuals buy into plans, we need to consider their heads, hearts and minds but we may also want to share with them what we know about managing change. This expertise is used everywhere, from transformation programmes in business to helping addicts recover. It is captured in the Unconscious Incompetence model, and in the emotional change curve – with tips on how to pay attention to the process and follow things through.

Recommended: schedule actions and responsibilities, in an organisational planning cycle, then pay attention to heads, hearts and minds, and follow through the 'change curve' into the long-term.

To just put a tow in the water in these two sections, take thirty minutes to:

1. **Make sure recommendations are considered and scheduled in the normal planning process**
2. **Think about heads, hearts and minds when planning action on recommendations.**