

IMPACT & INSIGHT TOOLKIT

SUMMARY OF FIRST ROUND OF STRATEGIC DEVELOPMENT STRAND WORKSHOPS

JUNE 2019

This report provides a summary of the discussions that took place at the first round of workshops for the Strategic Development Strand, the programme that enables National Portfolio Organisations (NPOs) to contribute to the development of the Impact & Insight Toolkit in 2019-20. The Strategic Development Strand workshops were based on seven workstreams that were identified at a previous round of NPO induction meetings:

Peer review: building an efficient system of fair and supportive peer review within the funded arts and cultural sector

Development of dimensions: testing, refining and adding to the dimensions that are used in the Impact & Insight Toolkit to evaluate the impact of cultural experiences

Touring: developing tools and processes to enable touring organisations to derive maximum benefit from the Impact & Insight Toolkit

Audience Finder: exploring the most effective ways for NPOs to use the Impact & Insight Toolkit and Audience Finder together

Diversity and accessibility: ensuring that the Impact & Insight Toolkit enables the experiences of people across society to be understood

Data analysis and use: exploring how Impact & Insight Toolkit data can be shared, analysed and used to help organisations to improve their practice

Building capacity and support: securing buy-in for the Impact & Insight Toolkit and providing evaluation guidance to organisations in more challenging circumstances (e.g. on evaluating outdoor/unticketed/one-off events)

This report describes how these workstreams were further developed at the Strategic Development Strand workshops. It provides summary data on the number of organisations signed up to each workstream and describes the tasks to be undertaken within each workstream in the short, medium and longer term.

Organisations that are signed up to the Strategic Development Strand are asked to read this report and contact support@countingwhatcounts.co.uk with any questions or further suggestions. Please also review the accompanying Excel file, which shows the workstream(s) that your organisation is currently signed up to, and contact us if you would like to make changes to your selections.

1. BACKGROUND

The purpose of the Strategic Development Strand of the Impact & Insight Toolkit is to enable Counting What Counts to work with NPOs to build the best possible

toolkit to meet the needs of the arts and cultural sector. In March 2019 we held an initial round of six Strategic Development Strand workshops in Bristol, Birmingham, Manchester, Newcastle and London. A total of 93 NPO representatives attended the events, bringing many different perspectives and ideas to the forefront of the project for consideration. We would like to thank everyone who attended for their time and thoughtful contributions.

The Strategic Development Strand workshops followed this flexible agenda:

- A brief explanation by Counting What Counts of how the Strategic Development Strand will be organised and managed
- Introduction to the seven workstreams listed above and a suggested set of tasks to be undertaken within each workstream
- NPOs signed up to the workstreams that they wish to contribute to
- A discussion of any gaps within the workstreams and new tasks that could be added
- An opportunity to reflect on the core Cultural Experience dimensions, chosen by the Arts Council, and to discuss how they might be relevant to evaluating different kinds of work

2. PARTICIPATION IN WORKSTREAMS

The tables below show the number of NPOs that signed up to participate in the seven Strategic Development Strand workstreams, broken down by artform and region. Within each workstream there is a good artform and geographic spread. The workstream to explore the analysis and use of Impact & Insight Toolkit data was the most popular, with 61 NPOs signing up, and we are considering how we can best organise smaller clusters of organisations to pool and analyse data around specific themes – tapping into existing regional networks such as Audience Finder clusters where possible.

Table 1: Number of organisations participating in SDS workstreams by artform

| Art form | Strategic Development Strand workstream | | | | | | |
|---------------|---|------------|-----------|-----------------|---------------------------|---------------|--------------------|
| | Peer review | Dimensions | Touring | Audience Finder | Diversity & Accessibility | Data Analysis | Capacity & Support |
| Dance | 2 | 4 | 3 | 5 | 1 | 2 | 4 |
| Combined Arts | 6 | 6 | 5 | 9 | 7 | 12 | 4 |
| Theatre | 7 | 11 | 8 | 8 | 7 | 17 | 5 |
| Literature | 2 | 4 | 0 | 1 | 3 | 3 | 1 |
| Visual Arts | 5 | 6 | 1 | 7 | 4 | 9 | 5 |
| Museums | 3 | 6 | 1 | 6 | 3 | 9 | 3 |
| Music | 4 | 5 | 6 | 7 | 4 | 9 | 0 |
| Total | 29 | 42 | 24 | 43 | 29 | 61 | 22 |

Table 2: Number of organisations participating in SDS workstreams by region

| Region | Strategic Development Strand workstream | | | | | | |
|---------------|---|------------|-----------|-----------------|---------------------------|---------------|--------------------|
| | Peer review | Dimensions | Touring | Audience Finder | Diversity & Accessibility | Data Analysis | Capacity & Support |
| East | 3 | 2 | 0 | 3 | 1 | 5 | 2 |
| East Midlands | 2 | 1 | 0 | 1 | 0 | 2 | 1 |
| London | 7 | 13 | 11 | 10 | 8 | 17 | 5 |
| North East | 3 | 4 | 0 | 3 | 3 | 3 | 0 |
| North West | 3 | 6 | 1 | 4 | 5 | 6 | 1 |
| South East | 2 | 4 | 1 | 2 | 3 | 6 | 2 |
| South West | 2 | 3 | 6 | 6 | 6 | 9 | 5 |
| West Midlands | 4 | 6 | 3 | 8 | 0 | 6 | 5 |
| Yorkshire | 3 | 3 | 2 | 6 | 3 | 7 | 1 |
| Total | 29 | 42 | 24 | 43 | 29 | 61 | 22 |

3. DEVELOPMENT OF WORKSTREAMS AND TASKS

After signing up to the workstreams that they were most interested in, attendees considered what additional tasks might be required within the workstreams and whether any further workstreams should be added.

After analysing the outputs of those discussions, we have:

- Split the ‘Building capacity & support’ workstream in two. Workstream 7 is now ‘Building capacity’, and includes tasks aimed at supporting organisations with particular needs to use the Impact & Insight Toolkit and developing and improving general guidance material. Workstream 8 is ‘Buy-in and support’ and focuses on building support for the Impact & Insight Toolkit among creative staff and leaders
- Added Workstream 9: ‘Evaluating the Impact & Insight Toolkit’ so that we can work with NPOs and the Arts Council to develop shared outcomes and success measures for the toolkit
- Added around 30 new tasks across the nine workstreams

The updated list of workstreams and tasks is provided in the appendix. It is an exciting and extensive body of work and the number of requests and suggestions made by workshop attendees indicates that the Strategic Development Strand is

not a one-off project to be completed within twelve months. Rather it is an ongoing process of collaborative development and improvement over the life of the Impact & Insight Toolkit, in which Counting What Counts will tackle tasks in order of priority, supported by organisations that are willing and able to contribute.

We have carried out an initial prioritisation of the tasks, and the table in the appendix indicates whether we are planning to commence each task in Phase 1 (May to August 2019), Phase 2 (September 2019 to March 2020) or Phase 3 (April 2020 and beyond). We have also colour coded each task to give a sense of the scale of work that we think will be involved (short task, project or ongoing activity). We would welcome feedback on our initial prioritisation and coding of tasks.

Please note that there were some additional questions and suggestions raised at the workshops that we did not feel would be best addressed through the Strategic Development Strand. We will be following up these points within our guidance materials or in consultation with individual organisations as appropriate.

4. WHAT HAPPENS NEXT?

The Strategic Development Strand is now fully underway and we will be contacting participating organisations over the coming months to request their input to various tasks. The nature of the ask will vary depending on the task in hand. In some cases we will ask for feedback on a document via phone or email; in others we may invite NPOs to share their views on an issue in a webinar. Some tasks will require more in-depth collaboration – for example, organisations that volunteer to act as case studies to understand how the Impact & Insight Toolkit and Audience Finder can work together will be involved in phone or face-to-face meetings with Counting What Counts and The Audience Agency, and will be asked to trial different methods of audience data collection.

When we launch a task we will be clear about what we are asking NPOs to do, by when, and how much time we think will be required. NPOs are free to choose which tasks they would like to help with depending on their interest and availability at the time. We hope that by participating in the Strategic Development Strand, organisations will develop a deeper understanding of how to evaluate different kinds of arts and cultural experience; share their own evaluation practices and ideas; and help create measures and tools that the arts and cultural sector can use to evaluate its impact in a joined-up way.

Based on the tasks scheduled for Phase 1 (May to August 2019), and depending on which workstreams they have signed up for, NPOs can expect to hear from us shortly about the following:

PEER REVIEW

- We are currently asking organisations to test and give feedback on the new peer portal, which enables users to register members of staff and other contacts as

peer reviewers. Several organisations have already taken part in 1:1 feedback sessions with our Product Owner, Callum Taylor.

- We will be asking for feedback on our new guidance document ‘Introduction to peer review’
- We will be inviting organisations to share their thoughts on how the peer survey could be expanded to capture more narrative and context, incorporating the most useful elements of the current AQA template

DEVELOPMENT OF DIMENSIONS

- Attendees at the Strategic Development Strand workshops were keen to develop a set of ‘sentiment dimensions’: dimensions that they can use to capture feelings of fun, enjoyment and other emotions among their audiences and visitors. We will be asking organisations that have signed up to this workstream to test and feedback on possible sentiment dimensions, with a view to creating a validated set for use by all NPOs
- We will be asking organisations in this and the Diversity & Accessibility workstream to contribute to and test a set of metrics for evaluating work in relation to diversity and equality

TOURING

- Working with consultant Katy Raines, we will be asking organisations to join a coalition to explore how best to maximise the potential of the Impact & Insight Toolkit for touring companies

AUDIENCE FINDER

- Working with The Audience Agency, we will be asking a small number of organisations that have registered for this strand to help us design and test different approaches to managing Audience Finder and the Impact & Insight Toolkit, including testing methods of collecting Impact & Insight Toolkit data using Audience Finder and vice versa

DIVERSITY & ACCESSIBILITY

- The first meeting of the Diversity & Accessibility governance group is scheduled to take place between May and September 2019. The agenda will incorporate issues raised by NPOs at both the induction and Strategic Development Strand sessions. We will circulate the meeting notes and agreed actions to all organisations registered for this strand
- We will be contacting relevant NPOs and other experts to identify partners and networks that we can collaborate with to improve the accessibility of the Impact & Insight Toolkit

DATA ANALYSIS AND USE

- We will be asking organisations in this workstream to review and give feedback on the template that NPOs will use to report on the results of their evaluations to Arts Council Relationship Managers

BUILDING CAPACITY

- Thanks to an enthusiastic group of literature NPOs, we are helping to facilitate an initial meeting or online discussion to start developing literature-specific dimensions for inclusion within the Impact & Insight Toolkit
- We will be asking for feedback on our new guidance documents on carrying out paper surveys and evaluating participatory work
- The theme for our June online training seminar will be how to train and support volunteers who will be surveying audience members and visitors

BUY-IN AND SUPPORT

- Please contact support@countingwhatcounts.co.uk if you would like to contribute a case study to share your organisation's early experiences of using the Impact & Insight Toolkit

EVALUATING THE IMPACT & INSIGHT TOOLKIT

- Any organisation interested in registering for this workstream should contact support@countingwhatcounts.co.uk. In the autumn we will be circulating a draft evaluation framework for the Impact and Insight Toolkit for comment and suggestions

We look forward to working with NPOs on these and other matters over the coming months, and to seeing the Impact & Insight Toolkit develop as a result of our joint efforts. In the meantime, **please contact support@countingwhatcounts.co.uk if there is anything in this report that you would like to discuss in more detail.**

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APPENDIX: STRATEGIC DEVELOPMENT STRAND WORKSTREAMS AND TASKS

The workstreams and tasks in the table below were identified based on feedback given at Impact & Insight Toolkit induction sessions held in January 2019 and revised based on the outputs of the Strategic Development Strand workshops held in March 2019.

Key: Short
 task
 Project Ongoing activity

| Workstreams and tasks | Phase 1 (April to Aug 2019) | Phase 2 (Sept 2019 to March 2020) | Phase 3 (April 2020 +) |
|---|-----------------------------------|--|------------------------------|
| 1. Peer review | | | |
| a) Design an expanded and improved peer survey, incorporating elements of AQA | ✓ | | |
| b) Give feedback on a beta version of the peer database | ✓ | | |
| c) Help recruit diverse peers to join the peer database, building on the Arts Council's ongoing work in this area | | ✓ | |
| d) Help to produce guidance on best practice peer review | ✓ | | |
| e) Help to produce guidance on how to recruit peers 'beyond the usual suspects' (New) | | ✓ | |
| f) Provide advice on how to integrate Impact & Insight Toolkit with existing networks e.g. mystery shopper networks (New) | | | ✓ |
| g) Participate in a pilot to explore the processes and outcomes of involving young people as peer reviewers, building on the Arts Council's work to date (New) | | ✓ | |
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| 2. Development of dimensions | | | |
| a) Test and give feedback on the Arts Council Core Cultural Experience Dimensions | | ✓ | |
| b) Test and give feedback on the Participatory Dimensions | | ✓ | |
| c) Test and validate sentiment metrics for capturing audience response in terms of emotion, enjoyment, fun (New) | ✓ | | |
| d) Contribute to and test a set of metrics for evaluating work in relation to diversity and equality (New) | ✓ | | |
| e) Develop new dimension sets in thematic areas (e.g. audience motivation, arts and health, creative case, social impact, economic impact) | | | ✓ |
| f) Co-produce new dimension sets with key groups e.g. dimension sets designed by audience members, children and young people (New) | | | ✓ |
| g) Explore how the Cultural Experience and Participatory Dimensions can be used to evaluate work in terms of the Arts Council's Quality Principles (New) | | ✓ | |
| | | | |
| 3. Touring | | | |
| | | | |
| a) Develop and share the best approach to enabling touring companies and venues to use the Impact & Insight Toolkit collaboratively. To include: <ul style="list-style-type: none"> Working with NPO and non-NPO venues and intermediaries (New) Data sharing templates (New) Cross-border touring (New) Approaches and processes for evaluating co-productions (New) Sharing evaluation accountabilities and benefits between commissioning organisations and commissioned artists (New) GDPR issues when organisations are distributing surveys on behalf of other organisations (New) | ✓ | | |

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|---|---|---|---|
| <ul style="list-style-type: none"> Potential development of an overall evaluation strategy for touring that incorporates Audience Finder and Impact & Insight Toolkit (New) | | | |
| b) Become a case study organisation to show how a touring company can use the same Impact & Insight Toolkit survey across a single tour | | | ✓ |
| 4. Audience Finder | | | |
| a) Become a case study organisation to discover how different types of NPO can best manage the data collection requirements of Audience Finder and the Impact & Insight Toolkit | ✓ | | |
| b) Help explore how data and insights from Audience Finder and the Impact & Insight Toolkit can be combined | | | ✓ |
| 5. Diversity and Accessibility | | | |
| a) Comment on meeting notes and agreed actions of the Diversity & Accessibility governance group | ✓ | | |
| b) Identify potential partners and networks (e.g. Bluecoat, Ramps on the Moon) that can help improve the accessibility of the Impact & Insight Toolkit (New) | ✓ | | |
| c) Work with relevant partners to explore the development of 'skins' that can be applied to the Impact & Insight Toolkit to make the language and survey technology accessible to different groups e.g. children and young people, people with learning disabilities, carers and other mediators (New) | | ✓ | |
| 6. Data analysis and use | | | |
| a) Review and provide feedback on the ' <i>Insight Reporting Template</i> ' | ✓ | | |
| b) Develop and test standard templates for reporting to other stakeholders e.g. boards, local authorities | | | ✓ |

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|--|---|---|---|
| c) Form a cluster of organisations with similar objectives to explore whether and how Impact & Insight Toolkit data can be pooled to inform organisational development and creative practice | | ✓ | |
| d) Form a regional/city/area cluster to explore whether and how Impact & Insight Toolkit data can be pooled to enable local benchmarking and develop joint advocacy materials | | ✓ | |
| e) Identify and prioritise policy questions to address using the anonymised, aggregate dataset. For example: <ul style="list-style-type: none"> • Understand how dimension scores differ by artforms (New) • Model relationship between cultural participation and e.g. social, health and economic outcomes (New) • Explore how audience experience is affected by the background and characteristics of audience members by analysing how dimension scores correlate with demographic data (New) | | ✓ | |
| f) Help design and test analysis/visualisation/benchmarking tools for accessing the anonymised, aggregate dataset | | | ✓ |
| g) Explore how Impact & Insight Toolkit data can be integrated with other datasets e.g. local authority data, data from other lottery distributors (New) | | | ✓ |
| h) Explore how Impact & Insight Toolkit data can be integrated with other types of evaluation data e.g. qualitative and ethnographic data to give a rounded picture of an organisation's value (New) | | | ✓ |
| i) Review and feedback on the artform/sub-artform coding system used within the Impact & Insight Toolkit (New) | | ✓ | |
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| 7. Building capacity | | | |
| | | | |
| a) Review Impact & Insight Toolkit guidance documents and instructional videos and identify improvements and gaps | ✓ | | |

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|--|---|---|---|
| b) Develop materials and guidance to build capacity and opportunities for volunteers collecting audience data (New) | | ✓ | |
| c) Join a group to help develop guidance for organisations evaluating in more challenging circumstances. To include: <ul style="list-style-type: none"> • outdoor events • one-night shows • events with multiple components (e.g. festivals) (New) • digital events (New) | | ✓ | |
| d) Join a group of literature organisations to explore how the Impact & Insight Toolkit can meet the needs of the literature sector, including the development of literature-specific dimensions (New) | ✓ | | |
| | | | |
| 8. Buy-in and support (New workstream) | | | |
| | | | |
| a) Help to design and organise an event aimed at building support for the Impact & Insight Toolkit among creative and senior staff | | | ✓ |
| b) Help to create guidance and advocacy resources aimed at creative and senior staff (New) | | ✓ | |
| c) Write a case study to show how your organisation has used the Impact & Insight Toolkit and what you learned as a result (New) | ✓ | | |
| | | | |
| Evaluating the Impact & Insight Toolkit (New workstream) | | | |
| | | | |
| a) Join a working group to help develop a method, outcomes and success measures for evaluating the impact of the Impact & Insight Toolkit (New) | ✓ | | |

