

Museums and Social Responsibility: Values Revisited

Social impact orientation and impact
analysis in the work of museums

Online-Workshop, 18. September 2020



After this workshop...

- ... you will know what the **terms „social impact“** and **„impact orientation“** imply.
- ... you will know why it is helpful for your organization / program to **work with a focus on social impact.**
- ... you will know what steps are necessary to **manage your organization / program with a focus on social impact.**
- ... you will know how to set **objectives with a focus on social impact.**
- ... you will know **tools to „measure“ the social impact of your work.**

About PHINEO





PHINEO aims to ...

STRENGTHEN

... impact-oriented civic engagement

SHOWCASE

... the successes of the social sector



PHINEO's Agenda

Create and distribute knowledge



Feature best practice in the social sector



Agenda Setting



Support Social Investors



„Social Impact“ and „Impact Orientation“ – some definitions





What is your organization here for?



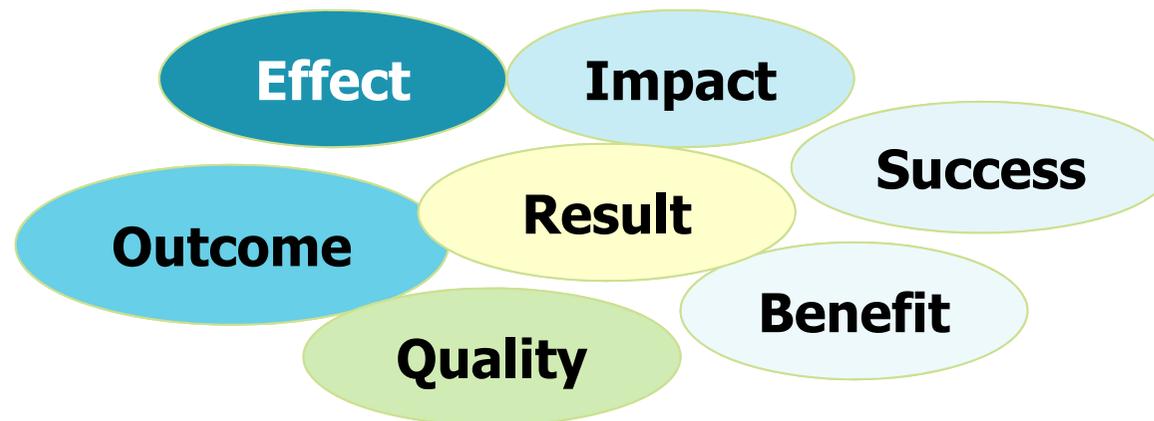
For it's social impact! ... (?)





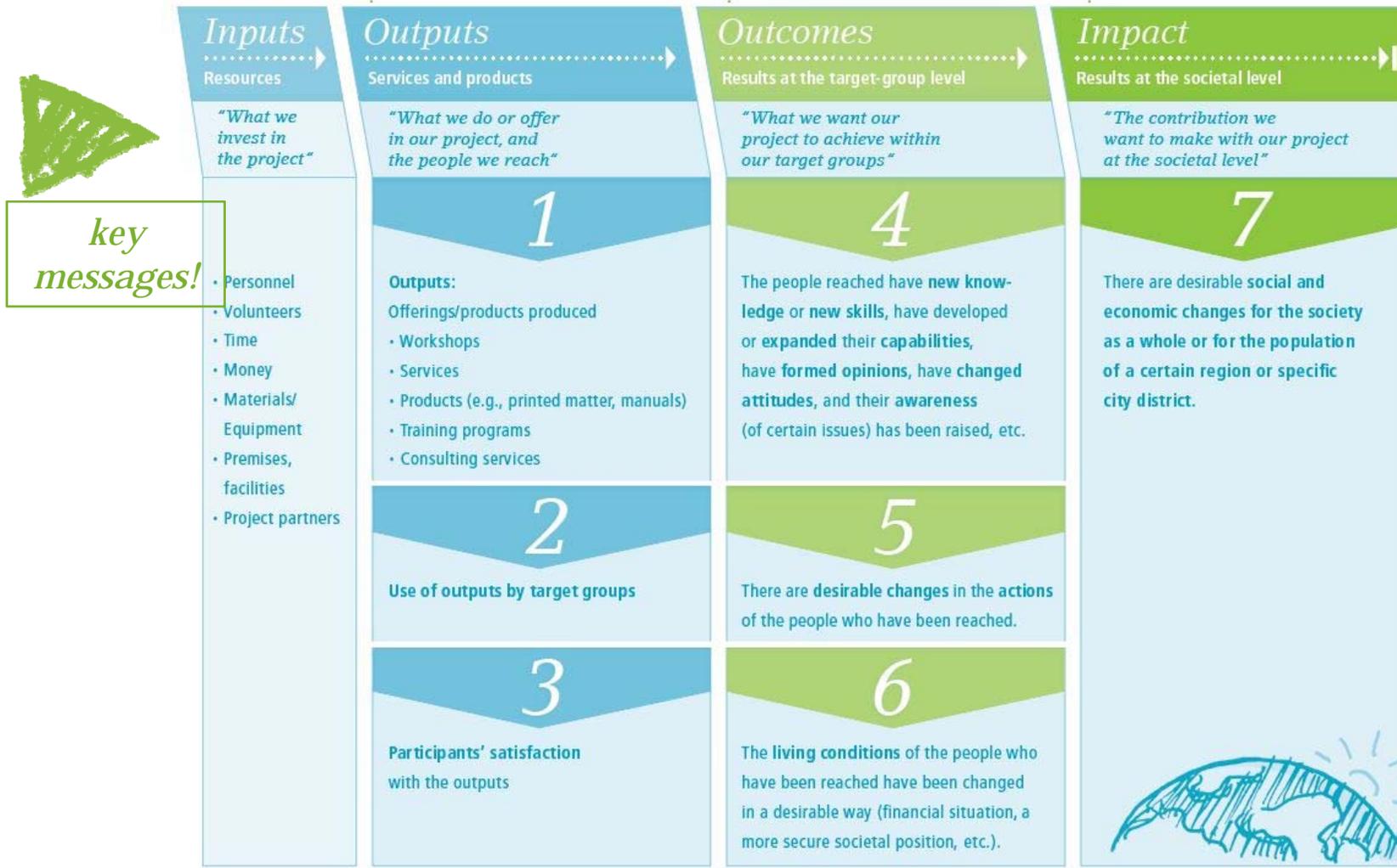
Be careful of not mixing up terminology

- In academia and practice different wordings and definitions are used in the context of social impact analysis
- The following explanations are based on the **Input- Output – Outcome – Impact- Methodology (I-O-O-I)**





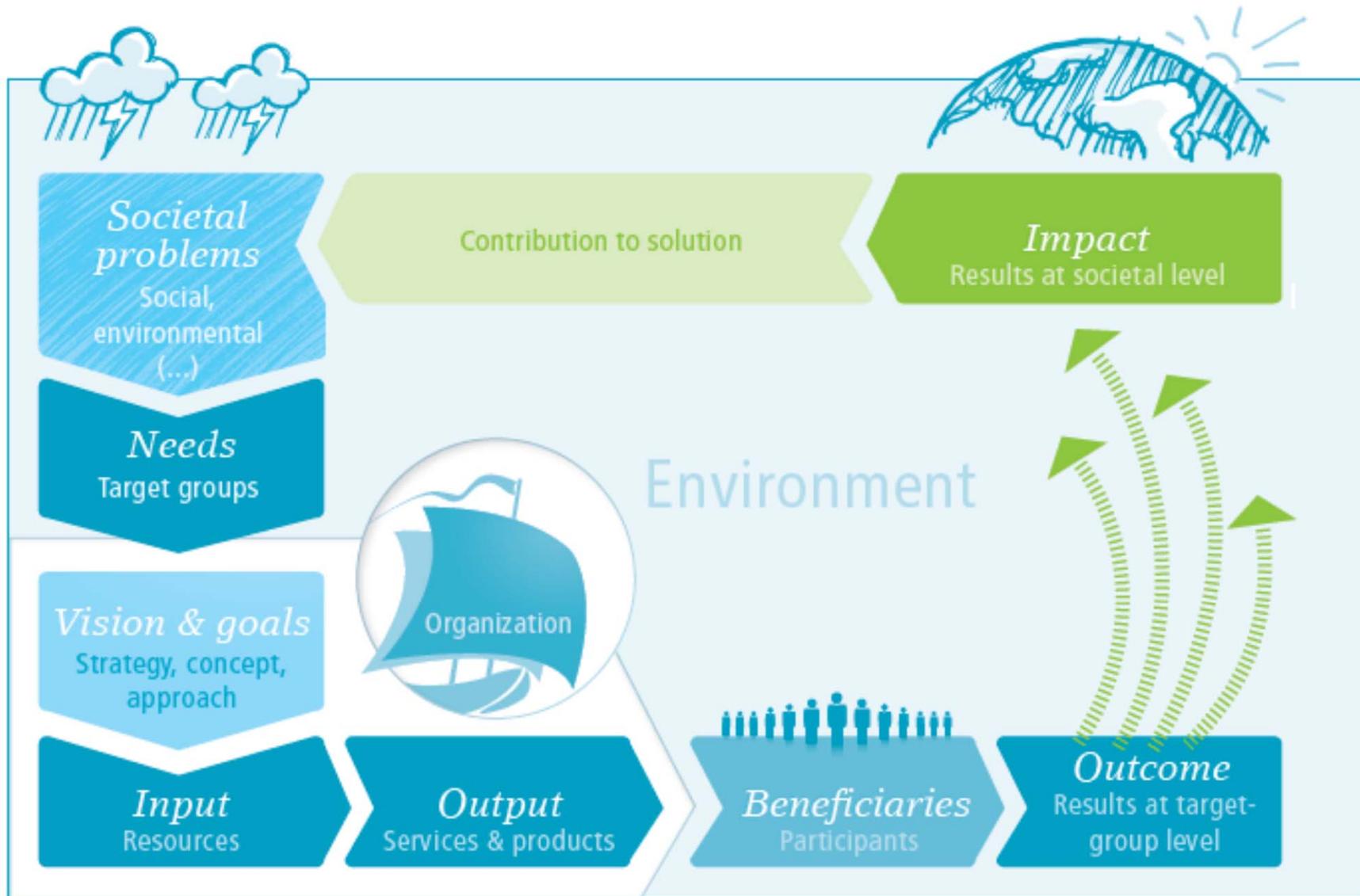
I00I – Logic Model



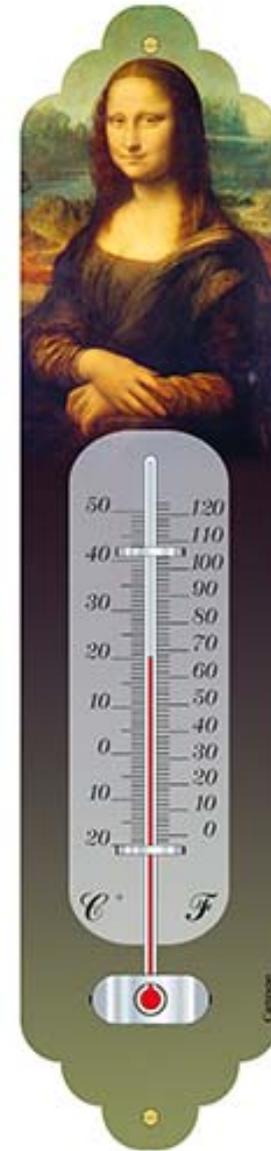
key messages!



The impact cycle



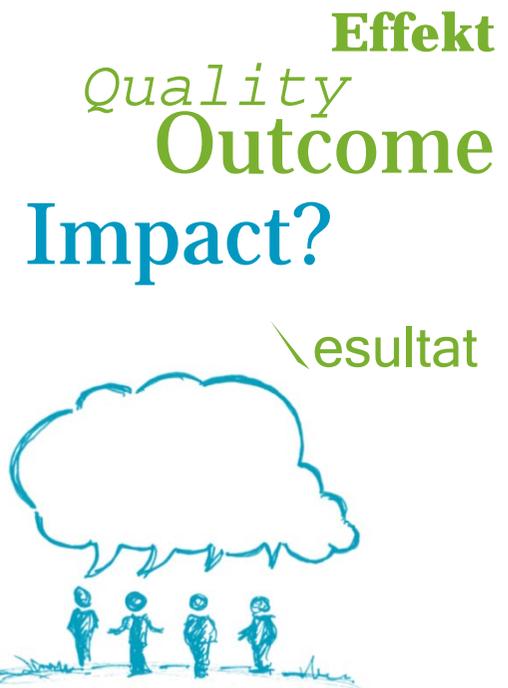
Social Impact in the work of museums





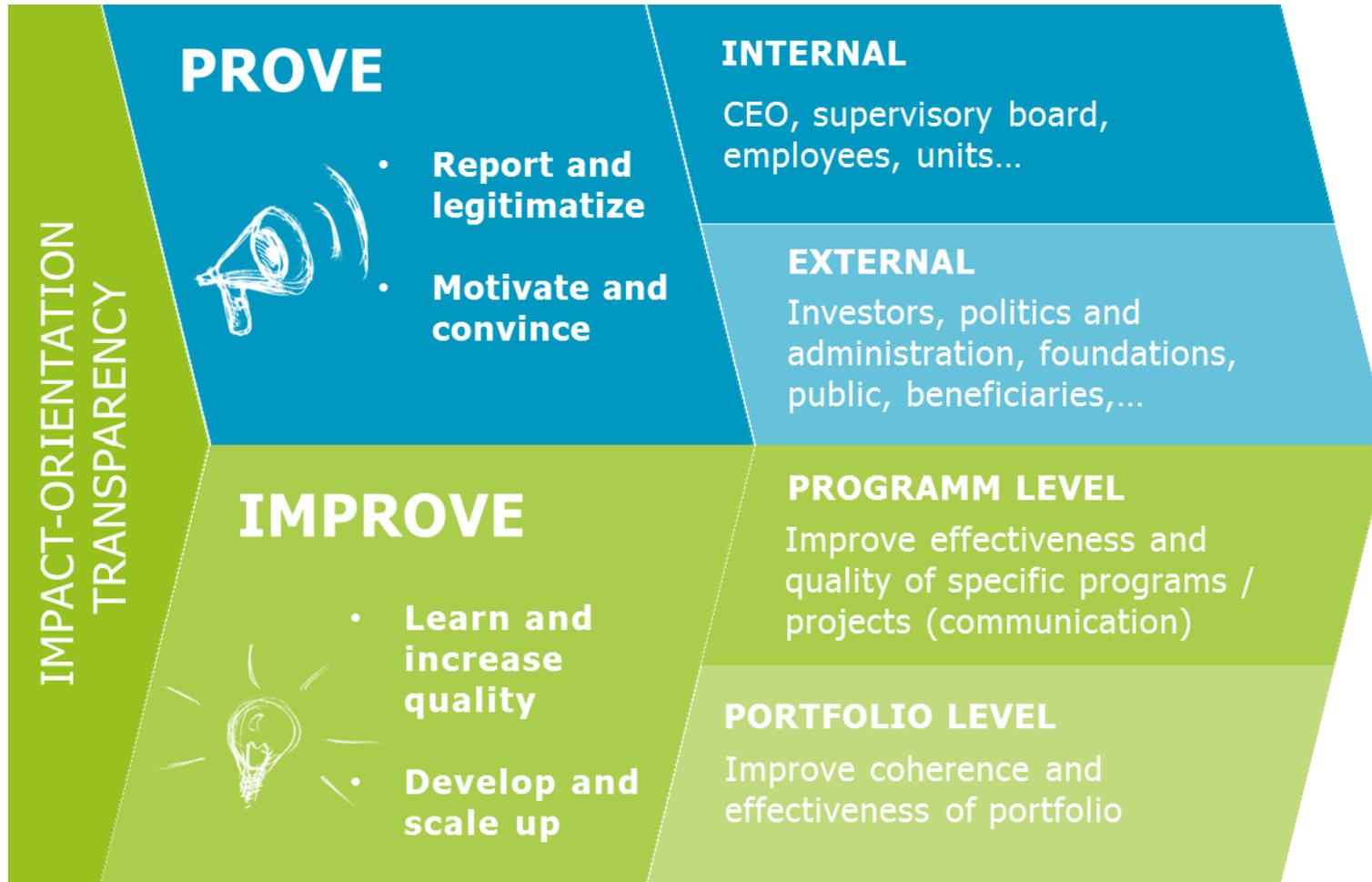
Social Impact in the work of museums - Challenges

- ▶ Contexts, needs and challenges vary and change
- ▶ Not easy to „prove“ results (short term interaction with target group)
- ▶ There are no common language or frameworks (yet) .
- ▶ Therefore: **Try out methods and approaches and exchange over best practice examples !**





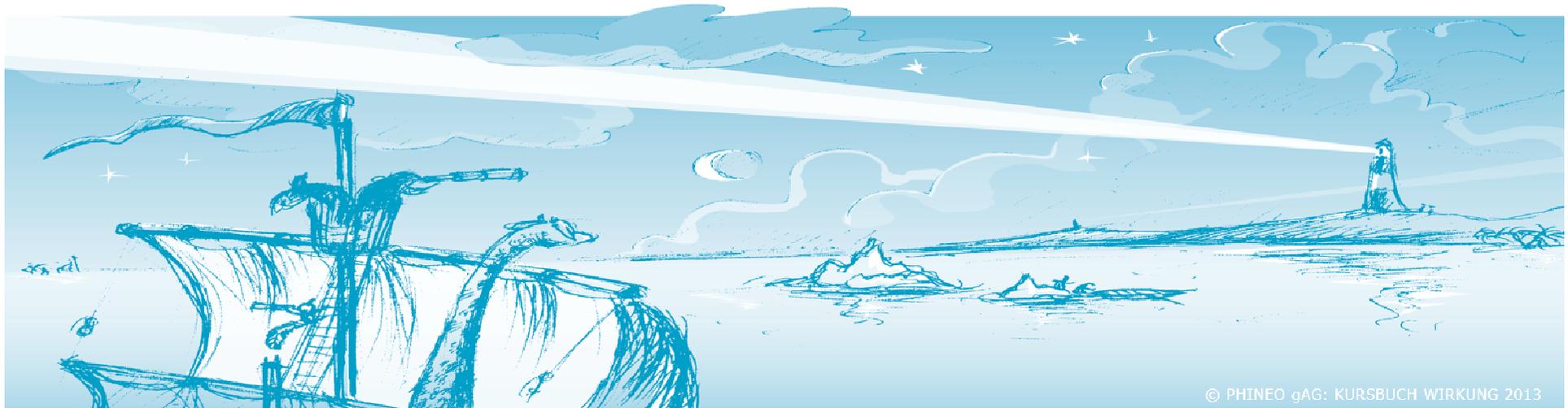
Why bother with impact orientation?





To work in an impact oriented way means that...

- ... a program / project aims to achieve impact ...
- ... and that it is planned and managed in order to do so.



... that you keep your focus on what you want to achieve.



Impact-oriented program and project management

4 PROVE AND IMPROVE

- Learning, quality development and scaling up
- Internal and external reporting (for key stakeholders)

3 IMPACT ANALYSIS

- 
- IOOI analysis
 - syndicate with strategic approach and concept



1 STRATEGY AND PLANNING

- Understand challenges and needs
- Develop a Theory of change/ IOOI, beneficiaries, objectives, indicators
- Gain a strategic approach and concept

2 IMPLEMENTATION

- Operational management of activities and data collection
- Systematic internal communication and coordination
- Efficient use of resources



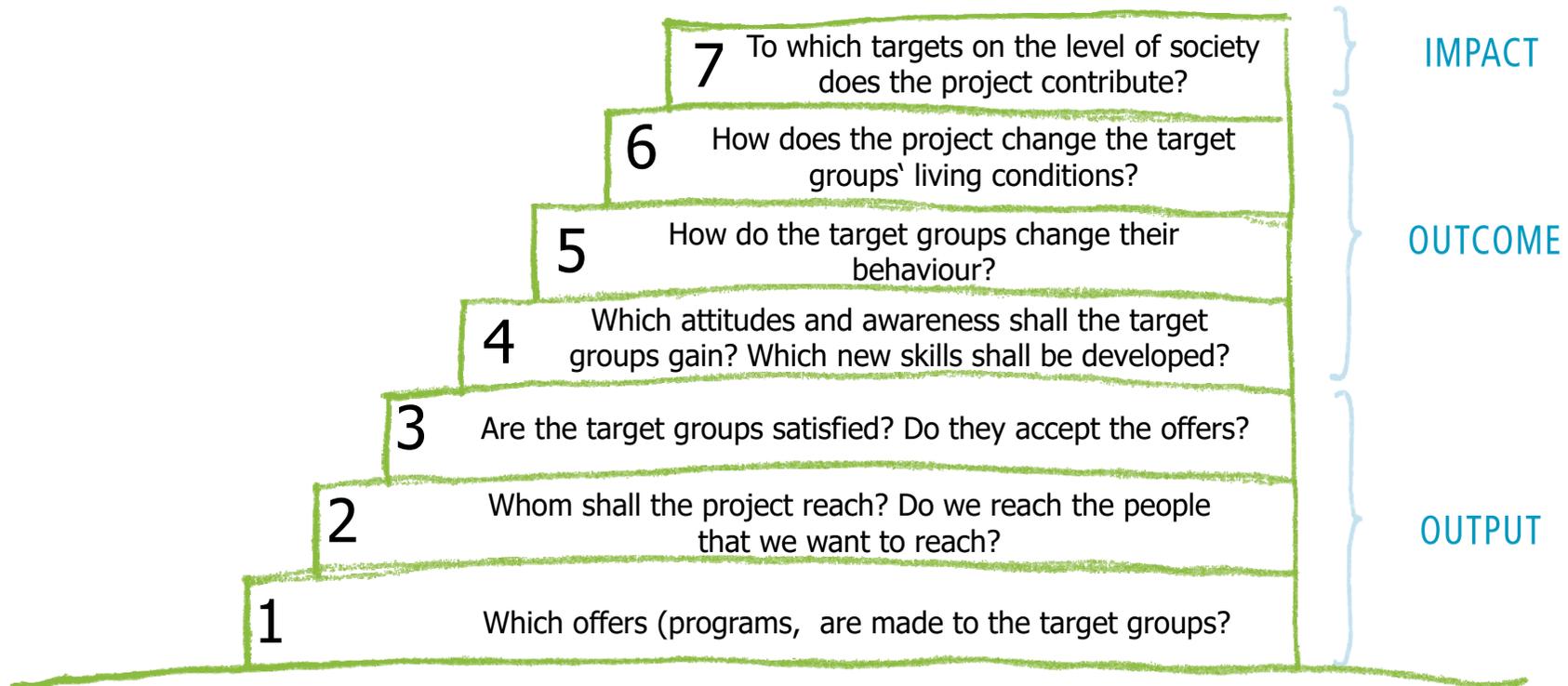
Understanding challenges and needs are the key to a impact oriented work

- 1. What is the societal challenge to be addressed? Is it as broad-scaled as anticipated? What is the state of affairs at the local level?
- 2. Who are the target groups? What do people need from the project?
- 3. Which stakeholders should be integrated into the project?
- 4. What offers already exist in the community? What results have they achieved? Are there gaps in existing support programs that need to be filled? Where are the opportunities for cooperation? Where might competition arise?
- 5. What are the causes and effects of the societal challenge, and how are they interrelated?





Setting project objectives: Guiding questions





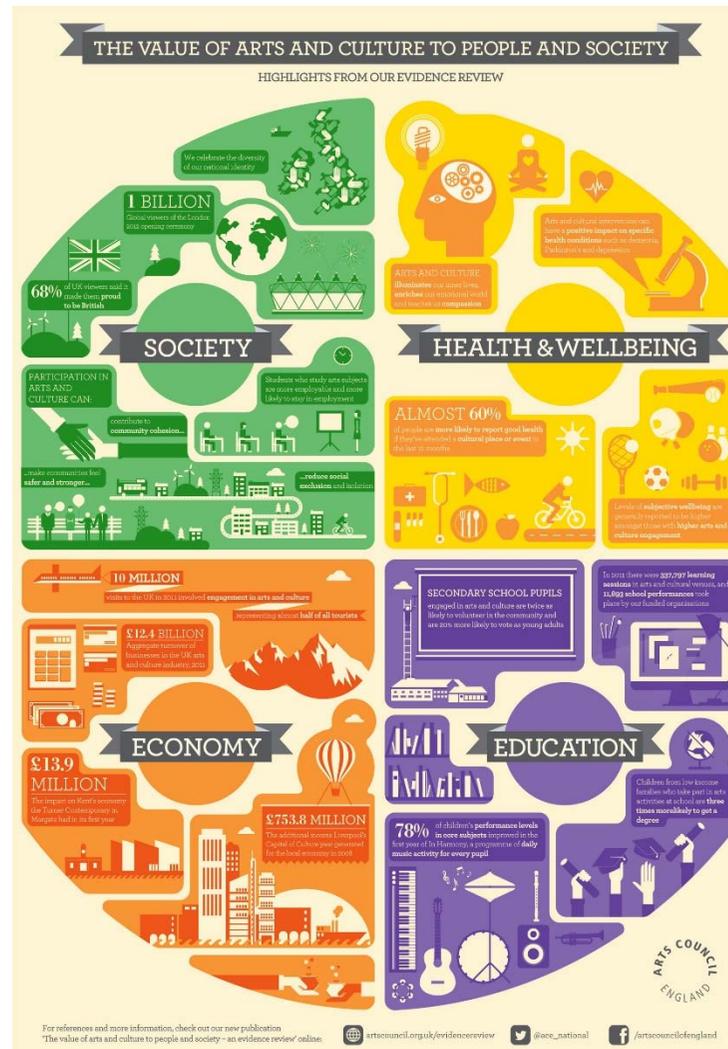
Hints for the formulation of project objectives

- **Begin** the statement by specifying the **target group** that are to benefit from the outcome.
- Use active verbs **to describe** how the target groups' living conditions will change if the desired outcome is achieved:
 - ✓ What new opportunities have emerged for members of the target groups taking part in the project?
 - ✓ How have participants' societal, financial or general living situations changed?
- Express the objective **as if the desired result had already been achieved** and use **positive** formulations.

S	Specific
M	Measurable
A	Accepted
R	Realistic
T	Time-framed



Impact and outcomes in the arts and cultural domain



Tools & methods to track („measure“) results





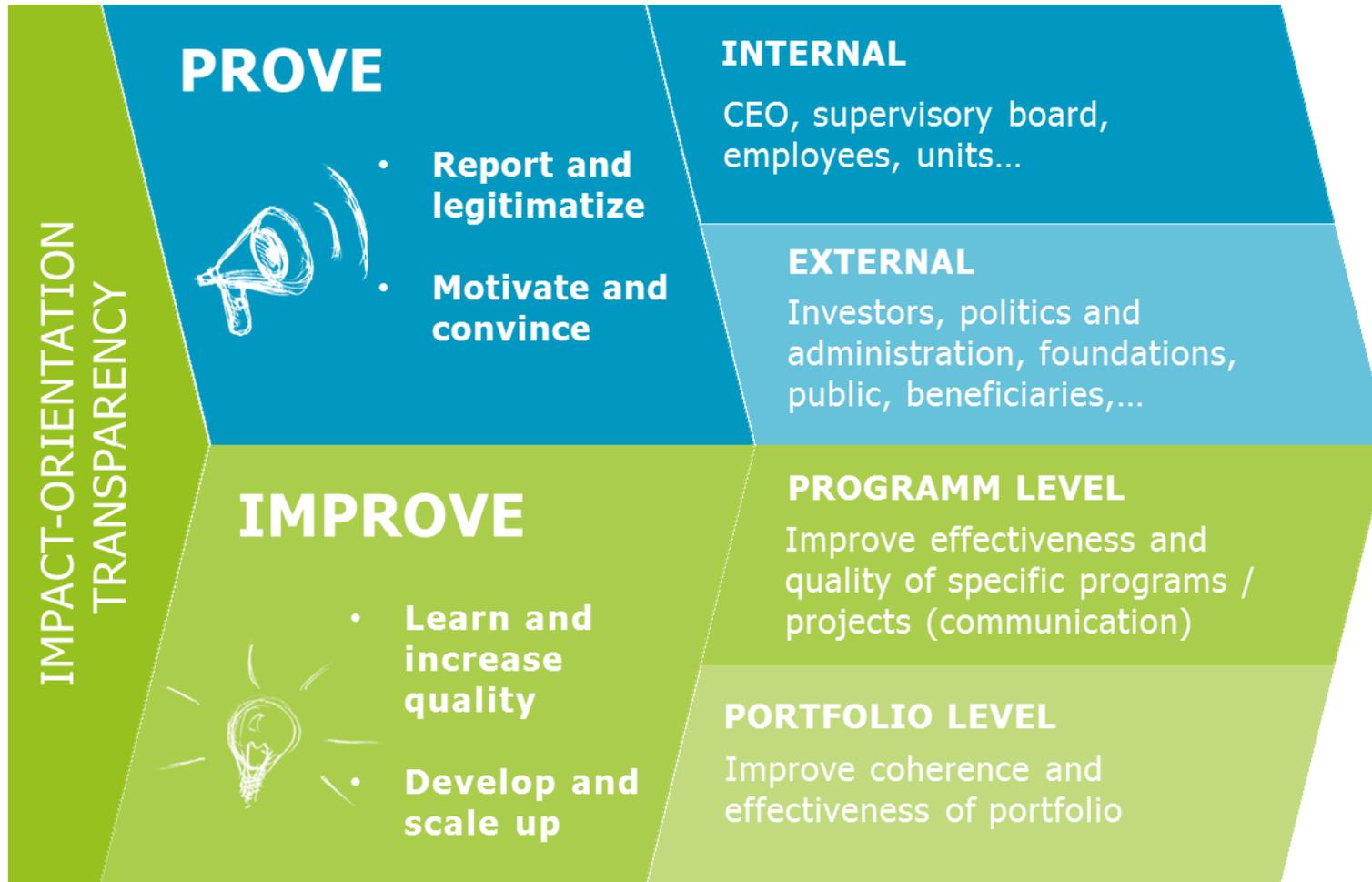
Data collection plan

<http://www.social-impact-navigator.org/impact-analysis/data/3-steps/>

		Explanation								
Template: Data Collection Provided by PHINEO for www.social-impact-navigator.org	Questions	List the questions for your social impact analysis here.								
	Indicator	Enter indicators here that can help to answer the questions.								
	Data sources	In this field, enter sources that can provide the information necessary to answer your questions.								
	Is data already available?	In many cases, information is already available from registration forms, participant lists, etc.								
	Data-collection instrument	Enter the data-collection instruments you propose using.								
	When and how often will data be collected?	At what points in time will the collection of the necessary data fit the project's schedule? When will the data have to be presented?								
	Who collects the data?	Who is capable and authorized to collect the data and has sufficient time resources?								
	Feasibility: yes /no?	Can the planned data collection be completed with the time and funds available, and is the process ethically valid?								



Why bother with impact orientation?

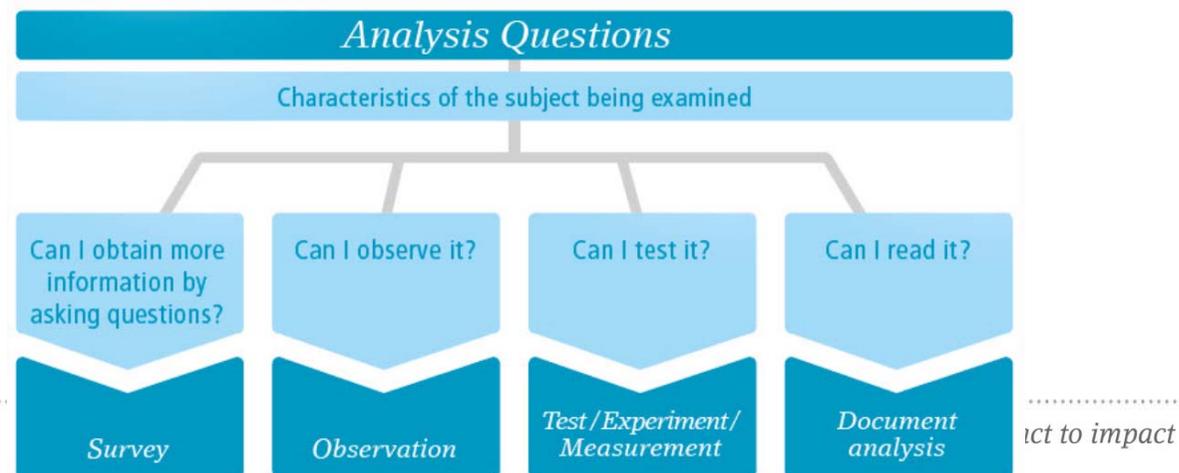




How to choose the right tool

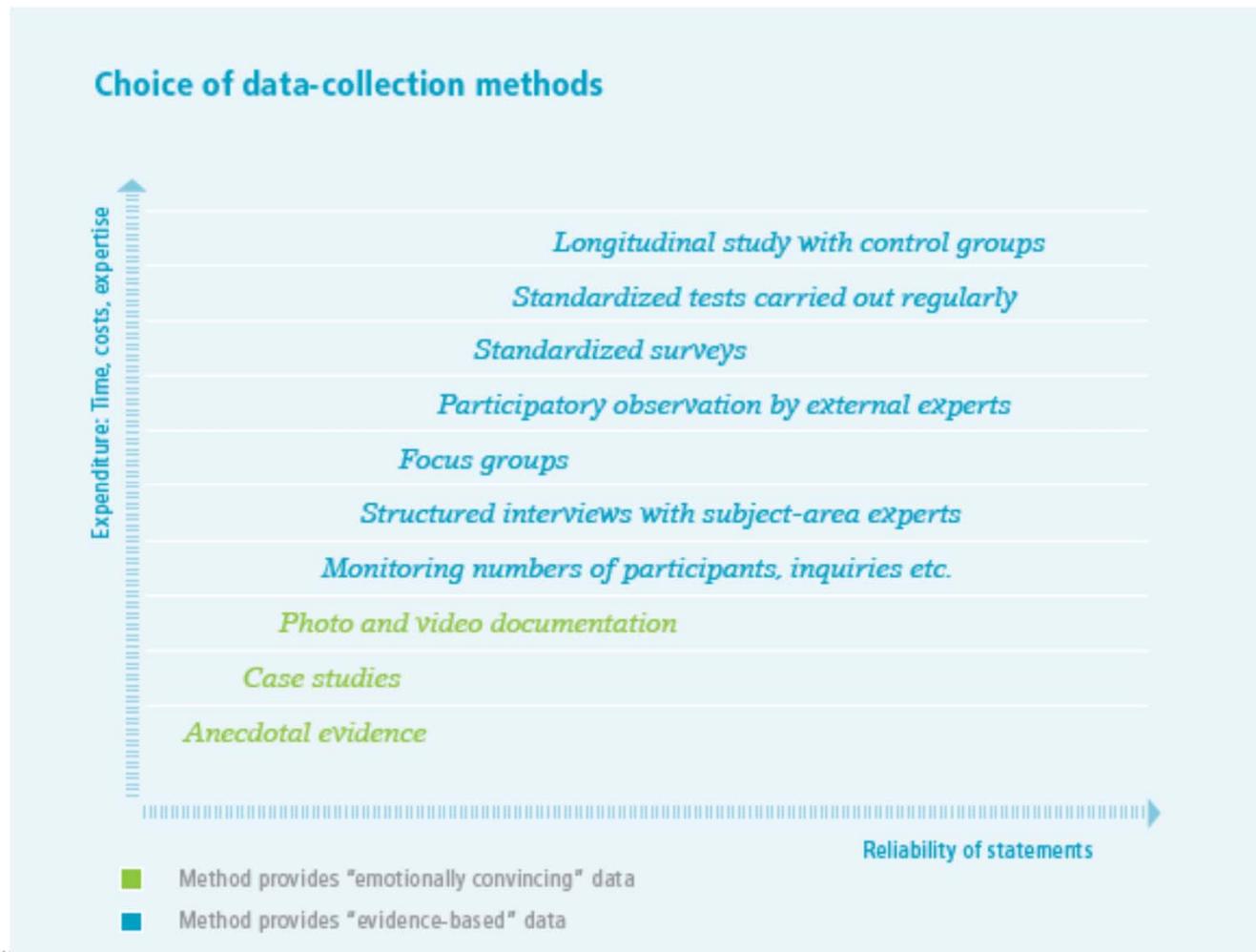
- What exactly do you want to find out?
- Why do you need the information?
- What scope and level of detail do you need or the data?
- Do you need “figures” or “stories”?

→ The more **angles** from which you consider your project, the more significant your understanding will be. For this reason, it makes sense to combine various data sources and data-collection methods – quantitative and qualitative alike.





The more complex the method gets, the more reliable the statements are





Quantitative and qualitative research methods

Quantitative research methods

... are particularly useful when:

- Precise data should be available
- You want to get a general overview of the situation
- Comparisons between different groups or persons are needed
- Statistical interdependencies between the problem and its suspected causes are to be tested
- Proof that a project is producing (countable) successes needs to be furnished

Quantitative methods include measurements, counting, analysis of quantitative secondary data (for example, from statistical reports), surveys, tests, and structured observations.

Qualitative research methods

... are characterized by a focus on the how and why of a situation or development. They are particularly suitable when:

- You want to accurately understand a situation in a certain context.
- You want to find out how individuals or groups evaluate their own circumstances, and learn about their expectations and wishes.

Qualitative methods include various forms of interviews (individual interviews, focus groups, etc.), observations and document analyses.



Questionnaires

The most commonly used type of data collection, **proven and effective**. With questionnaires, you can find out how satisfied participants are with an offering, how much they've learned, and whether they're actually acting on their new knowledge. Questionnaires with closed questions can be **quickly evaluated in bulk**; questionnaires with open questions generally provide useful additional information.

Advantages:

- Many surveys possible in a short time
- Data can be easily summarized
- Possible to ensure anonymity

Disadvantages:

- Preparation requires time and expertise
- Return rates may be low
- Answer options limited
- No opportunity for follow-up questions



Interviews

Individual interviews capture different perspectives on a particular subject.

They are useful:

- For surveys during the needs-assessment process
- When a new project module is being developed
- To elicit individual feedback
- To identify areas that can be improved

Advantages:

- Stakeholders are involved
- Provide relevant data
- Can reveal unexpected results, if any
- May elicit statements that wouldn't be made in a group situation
- Enable follow-up questions to the interviewee

Disadvantages:

- Time intensive
- Interviewers must be trained
- Results may be difficult to evaluate and quantify



Focus Groups

A **focus group** is a moderated discussion between multiple participants who engage with each other around a narrowly defined question. The key factor is the choice of the panel: Can the participants speak openly with each other? Do group members represent different viewpoints? Can a fruitful discussion develop?

Advantages

- Stakeholders are included
- Can also deliver unexpected results
- Added value provided by conversation between participants (different points of view)
- Follow-up questions possible

Disadvantages

- Medium time expenditure
- Expertise necessary
- Results difficult to quantify, and potentially hard to evaluate
- Participants may not speak openly



Informal Feedback / Anecdotes

It's crucial that you **collect** such information from informal conversations regularly and **systematically**, throughout the entire course of the project.

Project diaries kept by all full-time and volunteer staffers have shown themselves to be extremely useful in this context. It is also helpful to encourage staffers to report on anecdotes in project meetings, and to make sure to record these.

Advantages:

- Direct contact with the target group and also indirect target groups
- Provide information about unplanned effects
- Provide content for project communications (storytelling)
- No previous experience is necessary, inexpensive to implement

Disadvantages:

- Results are highly subjective and
- Difficult to generalize

→ See also: „Tiny Tools“ in the resources section



Systematic Observation

In **systematic observations**, events, individuals, groups and social spaces are observed. Systematic observations are appropriate when you want to check answers from a survey, or hope to develop further, specific findings.

Advantages:

- Information obtained directly from the target group or social space
- Can provide communicative content (storytelling)

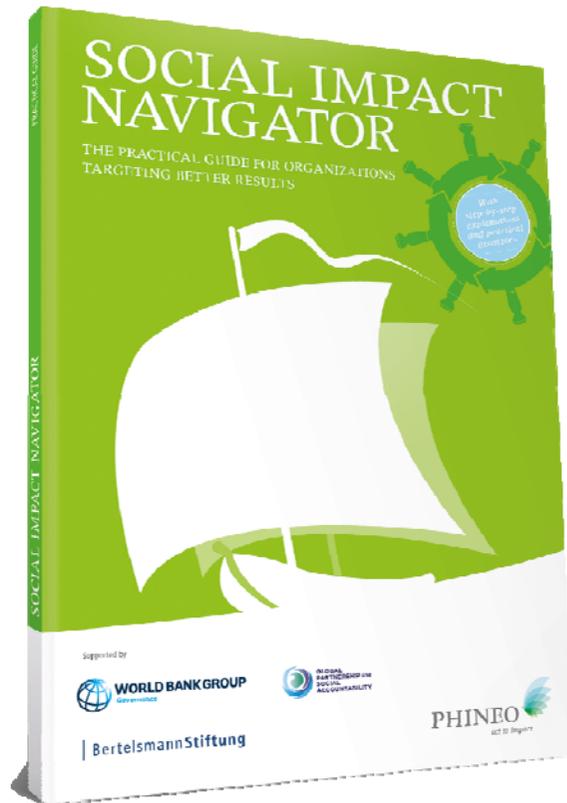
Disadvantages:

- Very time-consuming
- Observers must be trained
- Can be viewed as a violation of privacy





PHINEO's Social Impact Navigator



- **Already 20,000 copies of the guide circulating – get yours!**
- Know-how and instruments to systematically integrate impact orientation into your work
- With checklists and easy to use templates – just download it – free of charge!

www.social-impact-navigator.org

- Developed in cooperation with Bertelsmann Stiftung
- English edition supported by World Bank Group - Global Partnership for Social Accountability



Social Impact Navigator ONLINE!

Step by step to more impact!

Every day, people are working to advance society. In their neighborhoods, in their region or around the world. They all aim to achieve the **greatest possible social impact**.

But what exactly is social impact? How can it be measured? Or even planned?

This website sheds light on these matters – to help you do a better job of doing good. Step by step. Everything here is barrier-free, free of charge, and there is no need to register.

START NOW

THE CHAPTERS

PART 1: PLANNING IMPACT

- 1 Determining needs**
How to assess a project's context factors and define target groups.
- 2 Defining project objectives**
How to define project objectives and choose among various options.
- 3 Developing a logic model**
How to plan social impact.

PART 2: ANALYZING IMPACT

- 4 Preparing impact analysis**
How to monitor and evaluate a project.
- 5 Developing indicators**
How to make social impact verifiable.
- 6 Collecting data**
How to choose the right evaluation methods and quality criteria.
- 7 Analyzing data**
How to interpret and make use of data.

PART 3: IMPROVING IMPACT

- 8 Learning & improving**
How to leverage impact analysis results.
- 9 Reporting impact**
How to report impact.

- Videos, checklists, templates
- interactive learning
- barrier free
- free of charge

www.social-impact-navigator.org





Ressources

Overview:

Winner, Ellen/Goldstein, Thalia R./Vincent-Lancrin, Stéphan (2013): Art for Art's Sake?
- The Impact of Arts Education. Paris: OECD.

Outcome Indicators:

Outcome Indicators Project (Urban Institute): <https://www.urban.org/policy-centers/cross-center-initiatives/performance-management-measurement/projects/nonprofit-organizations/projects-focused-nonprofit-organizations/outcome-indicators-project>

Cultural Development Network: <https://culturaldevelopment.net.au/outcomes/cultural/>

Impact Oriented management with a focus on museums:

<http://www.shapingoutcomes.org/index.htm>

Using a BALANCED SCORECARD to measure a museum's performance:

https://www.bcg.com/publications/2012/public_sector_arts_culture_art_and_business_measuring_museums_performance

Target Groups:

Who's Coming? Respectful Audience Surveying Toolkit: <https://www.ofbyforall.org/resources>

Wallace Foundation:

<https://www.wallacefoundation.org/knowledge-center/building-audiences-for-the-arts/pages/audience-surveys.aspx>



Ressources

Evaluation resources:

Institute of Museum and Library Services:

<https://www.ims.gov/research-evaluation/evaluation-resources>

National Assembly of State Arts Agencies (NASAA):

https://nasaa-arts.org/nasaa_research/getting-started-program-evaluation/

Animating Democracy (Arts & Civic Engagement Impact Initiative):

<http://animatingdemocracy.org/home-impact>

NGO-IDEAs Tiny Tools for Impact Assessment:

http://www.ngo-ideas.net/tiny_tools/

Arts Council (UK) Selfevaluation toolkit:

<https://www.artscouncil.org.uk/advice-and-guidance-library/toolkits>

Animating Democracy:

<http://impact.animatingdemocracy.org/resources/tools>

National Endowment for the Arts:

[https://www.arts.gov/artistic-fields/research-analysis/program-evaluation-resources-and-performance-measurement.](https://www.arts.gov/artistic-fields/research-analysis/program-evaluation-resources-and-performance-measurement)



Thank you for your attention !

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