

THE SHIFT

THE NETWORKED ECONOMY, THE CULTURAL SECTOR AND BEYOND

by Culture Action Europe

THE SHIFT MANIFESTO

From sustainable development to sustainability

We are facing the failure of the *sustainable development* model from an environmental, social, economic and individual perspective. A possible new model is that of *sustainability: The sustainability revolution*. *Portrait of a paradigm shift* is the essay of Andras Edwards (2005) which summarizes the paradigmatic change needed to achieve sustainability. **The revolution requires new cultures, new social organizations, new economic models, etc.**

The role of culture

The first step required is a shift in our way of thinking: the shift of paradigm in fact is a *cultural matter*: therefore, the cultural sector is deeply involved in it.

Culture was already placed at the heart of sustainable development policies (Hangzhou Declaration of UNESCO, <http://unesdoc.unesco.org/images/0022/002212/221238m.pdf>)

All cultural institutions are required to co-operate to the realization of a change towards sustainability, building new knowledge, awareness, responsibility and new ways of thinking.

New experiences and new relationships are required to confront ourselves and experiment new paths for change. Edgar Morin affirms: *“The situation of the world requires the collective building of new ways of perceiving, thinking, acting ... and an equal and dignified citizenship to all human beings ... new relationships among individuals and among individuals and environment”* (Morin, E. (2008), *On Complexity*, Cresskill New Jersey: Hampton Press Inc.).

Such a cultural change is a real revolution and sustainability itself is considered a revolution, since its objective is changing the world.

The link among culture, social life, economy and ethic requires a change of model of thinking and strategies of dialogue and communication able to tackle knowledge and problems in a systemic, complex, transversal, interdisciplinary way.

SHARED ECONOMY

New models for sustainability

New models are needed in order to implement changes.

One possible model is that of the *shared economy* , based on the fact that we live in a world of fast-growing, multilayered, highly interactive, real-time connections among people.

Fig. 1. The new Maslow’s Pyramid



Source:<http://www.onemanandhisblog.com/archives/2013/09/02/post-25590-Maslow-pyramid-wifi-GKpx.png>

The shared economy is a sustainable economic system built around the sharing of human and physical assets: it includes the *shared creation, production, distribution, trade and consumption of goods and services by different people and organisations.*

It is meant to empower – by means of IT - individuals, corporations, non-profits and government with information that enables distribution and sharing capacity not only of goods but also of services; it encompasses a wide range of structures including for-profit, non-profit and co-operative structures and it is based on a set of values that includes trust, transparency, economic empowerment, creative expression, authenticity, community resilience and human connection.

Inter/Intra

The effect of a shared economy model are visible both inside an organization and outside it: it affects the way the organization shapes itself internally (vision, strategies, staff, internal processes, internal communication, etc.) and externally (partnership, positioning, external communication, sharing information, etc.)

Shared economy model within the cultural sector: a SWOT analysis

Strengths		Weaknesses
<i>INTERNAL COMPONENTS (Intra)</i>	<ul style="list-style-type: none"> •the model allows to shift from the production phase to the process one, nurturing social capital •within the cultural sector, some features essential to shared economy – such as shared horizontal sharing and peer-to-peer relationships - are privileged the model is based on shared vision, processes and strategy: cultural organisations are traditionally good at that! 	<ul style="list-style-type: none"> •small dimensions of cultural organisations •cultural organizations are very much focused on individuals (artists, entrepreneurs) •the sector shows a strong dependence from public funding (i.e. dependence from quantitative indicators) •strong resistance to partnership/co-operation/horizontal sharing
Opportunities		Threats
<i>EXTERNAL COMPONENTS (Inter)</i>	<ul style="list-style-type: none"> • the potential resources are not fully and efficiently exploited •need of analysis/understanding of the context we live /work in •full implementation of the social role of culture (audience development but not only in terms of numbers!) •integration of new professional profiles and competences in the field •creation of new ways of working: work is no longer a place but an activity... this is also a threat for cultural organizations since culture has a very strong power in terms of identity... •possibility of providing better, more personalized “customer” experiences...audience development in terms of small groups (if not of individuals) 	<ul style="list-style-type: none"> • is the cultural sector ready for that? •shared economy is about sharing information and data: what about copyright problems? And ownership of information...and sharing of it... •Social networks, mobiles, cloud devices are just tools but revolutionary, disruptive models are now possible with these real-time connections across people.

Interactive methodology used to improve this toolkit

• Lab Newcastle 2014

More than 30 cultural practitioners from all over Europe gathered in NewcastleGateshead for an equivalent of one-day Laboratory to understand and discuss the implications of this “paradigm shift” for the sector.

The Lab was designed as an occasion for participants to envision how this new paradigm should be designed and embedded in the community in order to be effectively impactful.

The active “laboratory-style” conversations were introduced by a presentation from Cristina da Milano (https://prezi.com/fewxoev8ztb_/the-next-rules-for-the-next-wave/) and were focused on discussing questions such as:

- How big is the “sharing” opportunity for me/my organisation?
- How much experience/knowledge/capability my organisation has in dealing with this issue?
- Where do opportunities really lie for you as a sector and as individuals?
- What does it really take to make it work?
- What are the most difficult challenges, in transforming this opportunity in a concrete one?
- What can be the catalyst element that can really make a difference and that can boost this process?

The group identified crucial issues (that will be explored in-depth in the next pages) and spent a considerable part of the conversation focusing on the concept of ‘building trust’ as an essential element for “sharing” to happen. The group highlighted the difficulties of the sharing process and the successful implementation of such models to the cultural sector that will depend on cultural operators’ ability to understand culture’s political, social and economic impact.

• Lab Gothenburg 2015

In the context of Beyond the Obvious 2015 (Culture Action Europe Annual Conference held in Sweden in October 2015), the work done on the issue of the networked economy and the cultural sector was presented and discussed during one of the second day “CAE window”, with a specific focus on the issue of partnerships. This was a moment of interaction between CAE and a group of practitioners from the cultural sector coming from over 180 of the Conference. The workshop within the CAE Window was based on the analysis of creative partnerships between artistic organizations and business companies in order to change organizational and leadership models (case study presented: [TILLT – Transforming Organisations With Arts](#)).

This intervention sparked a conversation among participants on what it takes to engage organisations in such journeys. A peer-to-peer training journey led by CAE raised naturally as a specific tool to allow deep exchange, learning, challenge.

• Lab Bruxelles 2016

The one day workshop in Brussels was based on the analysis of partnership experiences and on the opportunities and pitfalls of such activities.

Two case studies were presented, one by [Giovanna Barni of CoopCulture](#), Italy, and the other one by [Nicholas Anastasopoulos, National Technical University of Athens, Greece](#): both case studies focused on the issue of networking in the cultural field.

A dynamic conversation followed on some questions that are important for this group, such as:

- Tools and methodologies which may be used for addressing imbalances and asymmetries in partnerships
- Development of peer ethics and peer protocols in different types of situations and partnerships
- The specific role CAE has in supporting partnerships.

Issues

Cultural organisations and shared economy: main issues at stake (emerged also from the CAE labs):

VISION:

Organisations are consumer-oriented and not product-oriented

They have a strong sense of community

They know the context they live in and their stakeholders

Their work is based on clear agreements and transparent processes

They invest in training: the *first step* to implement new models is the capacity building of individuals and organizations

They seek for partnerships

They know crowd-funding and consider it an opportunity

SHARING:

They share their ownership/power with their stakeholders

They share information and data both internally and externally

They encourage/favour co-working

EVALUATION AND MONITORING

They measure their impact on society in economic, cultural and environmental terms

They are ready to accept unexpected outcomes and failures

COMMUNICATION (internal and external)

They effectively disseminate results (*advocacy/lobby*) (*multiply effect*)

THEMES: Partnerships

Different terms for partnership:

- shared learning
- cooperation
- collaboration
- teamwork
- joint education/practice
- interdisciplinary partnership working
- multi-disciplinary working
- participation

“The essence of partnership is sharing. It is marked by respect for one another, role divisions, rights to information, accountability, competence, and value accorded to individual input. In short, each partner is seen as having something to contribute, power is shared, decisions are made jointly and roles are not only respected but are also backed by legal and moral rights” (Jackson, S. and Morris, K. (1994) ‘Looking at partnership teaching in social work qualifying programmes’, London)¹.

“The cultural sector offers a great and unexplored potential for partnerships. Partnerships in the area of culture can bridge the funding gap of public entities, provide interesting investment opportunities for the private sector, but require environmentally and socially sound approaches that respect and benefit local communities. Such partnerships require the development of national legal, institutional, policy and administrative enabling environments, and offer opportunities to develop capacities, transfer of knowledge and excellence, and foster entrepreneurship. In which ways can we create win-win innovative, sustainable and equitable partnerships between private and public actors?” (UNESCO)².

Types

- Private-public partnerships

¹<http://www.scie.org.uk/publications/guides/guide23/references.asp#03>

²<http://www.unesco.org/new/en/culture/themes/culture-and-development/hangzhou-congress/public-private-partnerships-in-culture-sector/>

- Inter-institutional partnerships
- Inter-sectoral partnerships
- ***Creative partnerships***

What are creative partnerships?

They are defined as partnerships between cultural institutions and other sectors (education, training, business, management, research, social sector, health, etc.)³.

Why creative partnerships?

They concretely exemplify the benefits that culture may bring both to society and economy.

They can facilitate the contribution of culture and creativity to the EU2020 Strategy.

Their aims are:

- to enhance innovation;
- to offer new points of view;
- to create contexts in which problems can be tackled;
- to stimulate and express creativity;
- to develop professional and personal skills;
- to break down barriers between different communities/sectors;
- to achieve mutual “cross-pollination” between sectors.

Impacts

Creative partnerships have an impact on different levels:

- personal: they have proved to improve the social, cognitive, emotional and creative abilities of participants;
- organizational: they help improving the quality of products, the development of new products, the change of business model;
- social: they improve co-operation, raise awareness on social matters, may help overcoming individual problems that have a social impact, help

³OMC Working Group of EU Member States’ experts on Promotion of Creative Partnerships, *Policy Handbook on Promotion of Creative Partnerships*, March 2014, http://ec.europa.eu/culture/library/reports/creative-partnerships_en.pdf

creating new working opportunities for people engaged in the cultural sector, make connections with the public/audience.

How to set-up a creative partnership

Setting up a partnership requires:

- the intervention of a key driver who can initiate it: in most case, it is an organization acting as a mediator. The role of the mediating organization is to build and sustain networks and relations with stakeholders. The role of CAE as a mediating body was hugely discussed and certain conditions/elements of neutrality CAE can play in such processes were considered beneficial to this setting up stage.
- the delivery of appropriate training.

Training issues

Partners are expected to know about and understand:

- professional identities, perspectives and value bases
- group-work and teamwork
- role distinctions, boundaries, complementarity, conflict/miscommunication

Partners are expected to develop skills in:

- collaboration
- communication/dialogue
- advocacy
- managing multi-disciplinary meetings.

Evaluation

It is very important to evaluate a partnerships, in terms of:

- the process
- the outputs

Example

THE TILLT PROGRAMME: A model for artist-driven organisational change,
(www.tillt.se/in-english)

Pia Areblad, Founder TILLT, Sweden

An important component to develop sustainable creative partnership is the role of a producer of artistic interventions. The text below was produced as part of the European project TAFI; training artists for Innovation.

What is a producer?

Producers of artistic interventions specialise in linking together artists and organisations for mutual development, supporting and coaching both the participating organisation and the artist in order to make the collaboration fruitful for all stakeholders. The producers also conduct introductory sessions about artistic interventions as a methodology, but they do not specialize in providing training. The organisations we call “producers of artistic interventions in organisations” are also referred to in the literature as agencies (Staines 2010), intermediate organisations (Berthoin Antal 2009), intermediaries (Berthoin Antal 2012), mediators, process supporters, and creative brokers/agents. In this chapter, they are called producers.

A growing number of organisations across Europe are working as producers of artistic interventions.⁴ These organisations have different strategic aims, utilise a range of different funding structures, and apply various methodologies⁵. Figure 1 illustrates the diversity of possibilities based on the work of three producer of artistic interventions: TILLT (Sweden), Conexiones improbables (Spain) and 3CA (France).

⁴ See the mapping of producers of artistic interventions created in the project Creative Clash 2011-2013 www.creativeclash.eu

⁵ For an overview of different methodologies see, for instance, Berthoin Antal, A., Gómez de la Iglesia, R, and Vives Almandoz, M. (2011) *Managing artistic interventions in organisations: a comparative study of programmes in Europe*, TILLT Europe http://www.wzb.eu/sites/default/files/u30/report_managing_artistic_interventions_2011.pdf or Berthoin Antal, A., (2012) *Artistic Intervention Residencies and their Intermediaries: a comparative analysis* *Organizational Aesthetics* 1(1) 44-67.

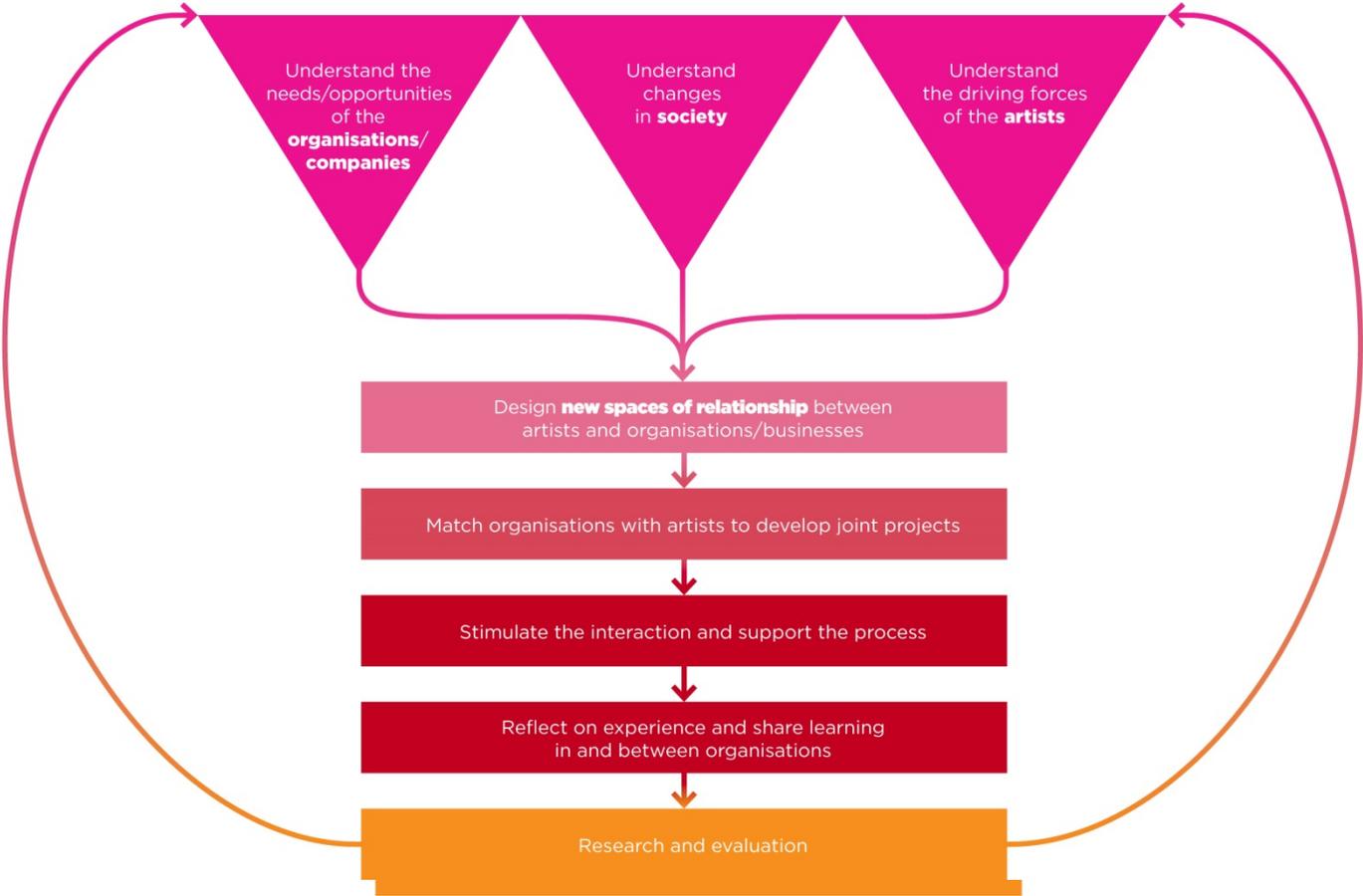
Given that artistic interventions in organisations are a relatively new methodology, producers have an important function in creating the market by communicating what artistic interventions are and how they add value for organisations, artists and the wider society. In order to do this, producers must be in touch with changes in society and understand the needs of each stakeholder participating in interventions—artists, managers and employees. They also must advocate the value of artistic interventions to policy makers and funding agencies. Producers engage in active networking between the worlds of art, organisations (public and private) and policymaking, and they communicate through multiple media, such as conferences, websites, reports and exhibitions. Thus, with a broad body of practical and theoretical understanding, the producer investigates new spaces for collaboration that enhance the development of the three stakeholders.

The first step in actually undertaking an artistic intervention is to recruit an organisation that wants to collaborate with an artist. Then the search for the right artist for this particular project starts (which can be an open international call or through networking or through its own database of artists). To match the right artist with the right organisation the producer has to understand the needs/opportunities of the organisation as well as the driving forces and the questions/inquiries with which the artist works. The matching of artist and organisation also includes assessing the artist's intentions for the project and his/her capacity for successfully pursuing such a project. The aim is to find artists that see artistic intervention as a part of their artistic practice and as a chance to develop further as artists. The challenge for the producer is to formulate a project that is equally interesting for both the artist and the organisation.

Once the project starts, the producer uses process support to monitor the creative process. The role of the producer here is to create a safe environment for social interaction where each part is protected and can stay true to itself. In such a space, mutual interrogation and provocation can take place without compromising the integrity of the parties. Throughout the project the producer monitors the development and provides process support. The producer helps participants translate their concepts from the world of the arts and the world

of organisations into a common language, addresses conflicts that may emerge, acts as a buffer between the artist and the organisation, and guides the parties to take advantage of opportunities generated during the project. The full value of an artistic intervention is reaped when the needs and potentials of all partners involved are respected and integrated.

Figure 2: The producer of artistic interventions. Source: Creative Clash 2011-2013



A key role of the producer is to stimulate reflection on experience. This can be within or between projects. Some producers (e.g., TILLT and Conexiones improbables) organize collective reflection between participating organisations and artists at the mid-point in a project cycle and at the end of the project period. By enabling the participants to share experiences and learning in

seminars/workshops producers help them maximise their learning and stimulate networking.

After the project, the producer and/or research partner evaluate the process and the outcome. These results feed into further building the experience and competence of the producer as well as providing evidence of the added value that the artistic intervention generated. Evaluation is also crucial to build the market for artistic interventions. By proving past success, new organisations and artists are motivated to engage in future collaboration projects.

ased their confidence about the value of their art for society. Collaborating with employees and managers in organisations brought to their attention that others value the knowledge and skills of artists. Such a perspective made the artists realise that they often do not see the full value of their own work. In addition, they realised that that they should look for cooperation on equal terms (Staines 2010).

P.11 THEMES: Crowd-funding⁶

Crowd-funding is a rather new method to fund projects by individuals using the social web. Crowd-funding is not only a new source of financing but an almost philosophical approach applying the Web 2.0 paradigms of transparency and participation⁷.

Crowd-funding can be defined as a form of financing through an open call via social media / Web 2.0.

The objective of crowd-funding is to finance a specific project or enterprise. Usually contributors are promised immaterial, material or financial rewards.

A significant number of crowd-funding platforms have been established in many European countries. Most platforms in the creative sector provide in-kind rewards whereas a rising number of platforms in the field of music share financial revenue with investors sometimes addressed as co-producers.

Social media play an important role for the development of crowd-funding. Facebook, Twitter, and blogs are important tools to communicate information about crowd-funding projects to potential contributors and possibly convert social capital into financial capital. The interactive web empowers users to create content and to distribute and discuss it. The social web enables bypassing the intermediaries of a traditional supply chain.

The nature of the social web is quite informal. Crowd-funding is successful because it transfers models of informal co-operation to the world of financing and leads to democratisation and transparency in financing.

Types of crowd-funding

When talking about crowd-funding we can differentiate between crowdsupporting (giving money, without reward), crowd-funding (investing for benefits) and peer-to

⁶<http://www.eenc.info/wp-content/uploads/2012/11/DR%C3%B6thler-KWenzlaff-Crowd-funding-Schemes-in-Europe.pdf>

⁷ A good example of crowd-funding platform is Goteo <http://goteo.org/about>

-peer lending initiatives. The differences among various crowd-funding projects include:

- the purpose of the crowd-funding project (business, creative, political, social)
- the aim of the funder (donation, non-financial reward, financial reward, return of loan)
- the underlying tax regime (for profit, non-profit)

Example

TENPAGES.COM (<http://www.tenpages.com>)

Key words: funding; social media; democratisation; transparency; participation

Description

TenPages.com is a Dutch platform to crowd-fund literature. Talented authors are motivated to send a manuscript which is going to be discussed online. People who want to support the financing of the book can buy shares 2.000 shares at 5 euro each and become “aandeelhouders”. A visitor can buy no more than 200 shares of one manuscript but publishing houses may get all the remaining shares in one go.

Key issues

The platform is characterised by a blog covering new online publishing trends as follows: “Introducing crowd-funding as a way to substantiate the publishing decision, TenPages.com has found a niche between traditional book publishing and self-publishing. In fact it helps aspiring authors to get published by traditional book publishers. Simultaneously this charming and inspiring initiative helps book publishers to better connect with their most important stakeholders: their readers and authors.”⁸

Example

⁸https://telfleur.wordpress.com/2010/10/08/tenpages_selfpublishing/

DOMUS AUREA (<http://archeoroma.beniculturali.it/cantieredomusaurea/>)

Key words: funding; social media; democratisation; transparency; participation; shared ownership

Description

Emperor Nero's Domus Aurea (Golden House), was built in 64 A.D. but after Nero's suicide in 68 AD the emperors who succeeded him proceeded to bury all trace of his legacy, included the Domus. The Flavian amphitheater, better known as the Colosseum, was built on the site of Nero's palace-side lake, while Trajan built his baths on top of the main part of the building.

The golden palace first re-opened in June 1999 after 21 years in which it was Rome's best-kept secret - open only to art officials and special guests. Some five billion lire (2.5 million Euros) were spent in refurbishing the visitable rooms filled with frescoes. It was then shut in 2005 to make it safe from collapse and reopened partially in October 2014. The last reported occurrence of damage to the Domus was on March 30, 2010 when part of a ceiling in subsequent baths above it fell in. The top of the Domus on the Colle Oppio (Oppian Hill) is covered with parks, trees and roads whose weight and polluting effect are a constant threat: some 60 square meters of the baths built on top of the Golden House by Trajan came down because of seepage from heavy rains. The partial reopening has opened up 2,600 square metres of the site, a tiny fraction of its size (when the Domus was completed, it actually stretched for 50 hectares).

The new visits to the Golden House, which is still undergoing massive maintenance and restoration, last an hour and are rigorously reservation-only. Authorities announced in June that the rundown Domus would be looking for sponsors in order to fully reopen.

Key issues

The new opening was partly funded by Sky Italia, but the Domus Aurea's upkeep against subsidence and water infiltration will also be financed by one of Italy's first cases of cultural crowd-funding.

With an innovative project of collective financing in progress and a digital story told in a dedicated blog, the site of the Domus Aurea is an interesting case of heritage enhancement.

The restoration project of the old residence of Nero is based on the use of new technologies and civic participation. Thanks to a blog, citizens are actively interacting with archaeologists and scientists, asking for information and commenting on the steps of the restoration process. Furthermore, thanks to the crowd-funding platform, citizens and tourists can participate in helping the continuation of the process itself, re-affirming a shared ownership of the heritage site.

P.11 THEMES: Sharing of information (open data)⁹

Open data are the building blocks of open knowledge. Open knowledge is what open data becomes when it's useful, usable and used.

The key features of openness are:

- Availability and access: the data must be available as a whole and at no more than a reasonable reproduction cost, preferably by downloading over the internet. The data must also be available in a convenient and modifiable form.
- Reuse and redistribution: the data must be provided under terms that permit reuse and redistribution including the intermixing with other datasets. The data must be machine-readable.
- Universal participation: everyone must be able to use, reuse and redistribute — there should be no discrimination against fields of endeavour or against persons or groups. For example, 'non-commercial' restrictions that would prevent 'commercial' use, or restrictions of use for certain purposes (e.g. only in education), are not allowed.

Why should data be open? The answer, of course, depends somewhat on the type of data. However, there are common reasons such as:

⁹ <http://opendatahandbook.org/>

- Transparency. In a well-functioning, democratic society citizens need to know what their government is doing. To do that, they must be able freely to access government data and information and to share that information with other citizens. Transparency isn't just about access, it is also about sharing and reuse — often, to understand material it needs to be analyzed and visualized and this requires that the material be open so that it can be freely used and reused.
- Releasing social and commercial value. In a digital age, data is a key resource for social and commercial activities. Everything from finding your local post office to building a search engine requires access to data, much of which is created or held by government. By opening up data, government can help drive the creation of innovative business and services that deliver social and commercial value.
- Participation and engagement – participatory governance or for business and organizations engaging with your users and audience. Much of the time citizens are only able to engage with their own governance sporadically — maybe just at an election every 4 or 5 years. By opening up data, citizens are enabled to be much more directly informed and involved in decision-making. This is more than transparency: it's about making a full “read/write” society, not just about knowing what is happening in the process of governance but being able to contribute to it.

There are many kinds of open data that have potential uses and applications:

- **Cultural**: Data about cultural works and objects — for example titles and authors — and generally collected and held by galleries, libraries, archives and museums.
- **Science**: Data that is produced as part of scientific research from astronomy to zoology.
- **Finance**: Data such as government accounts (expenditure and revenue) and information on financial markets (stocks, shares, bonds etc).
- **Statistics**: Data produced by statistical offices such as the census and key socioeconomic indicators.
- **Weather**: The many types of information used to understand and predict the weather and climate.

- Environment: Information related to the natural environment such presence and level of pollutants, the quality and rivers and seas.
- Transport: Data such as timetables, routes, on-time statistics.

Example

CREATIVE COMMONS (<http://creativecommons.org/>)

Key words: open data; copyright; sharing

Description

Creative Commons (CC) is a non-profit organization devoted to expanding the range of creative works available for others to build upon legally and to share. The organization has released several copyright-licenses known as Creative Commons licenses free of charge to the public. These licenses allow creators to communicate which rights they reserve, and which rights they waive for the benefit of recipients or other creators.

Wikipedia uses one of these licenses; as of October 2011, Flickr alone hosts over 200 million Creative Commons licensed photos.

Creative Commons has been described as being at the forefront of the copyleft movement, which seeks to support the building of a richer public domain by providing an alternative to the automatic "all rights reserved" copyright. It has been credited with generating interest in the issue of intellectual property and contributing to the re-thinking of the role of the "commons" in the "information age". Beyond that, Creative Commons has provided institutional, practical and legal support for individuals and groups wishing to experiment and communicate with culture more freely.

Creative Commons attempts to counter what Lawrence Lessig, founder of Creative Commons, considers to be a dominant and increasingly restrictive permission culture: Lessig describes this as a culture in which creators get to create only with the permission of the powerful, or of creators from the past. Lessig maintains that modern culture is dominated by traditional content

distributors in order to maintain and strengthen their monopolies on cultural products such as popular music and popular cinema, and that Creative Commons can provide alternatives to these restrictions.

Lessig wrote that the point of Creative Commons is to provide a middle ground between two extreme views of copyright protection—one demanding that all rights be controlled, and the other arguing that none should be controlled. Creative Commons provides a third option that allows authors to pick and choose which rights they want to control and which they want to grant to others.

Partners/Organisation in charge

The organization was founded in 2001 with the support of Center for the Public Domain. Creative Commons is governed by a board of directors. Their licenses have been embraced by many as a way for creators to take control of how they choose to share their copyrighted works.

Key issues

Creative Commons licenses do not replace copyright, but are based upon it. They replace individual negotiations for specific rights between copyright owner (licensor) and licensee, which are necessary under an "all rights reserved" copyright management, with a "some rights reserved" management employing standardized licenses for re-use cases where no commercial compensation is sought by the copyright owner. The result is an agile, low-overhead and low-cost copyright-management regime, profiting both copyright owners and licensees.

P.11 THEMES: Impact evaluation

Evaluation is essential to assess the effectiveness of a cultural institution/organisation activities and to improve their quality. Evaluation is useful for practical, theoretical and research purposes. It gives an important feedback on the impact of activities or projects aimed at engaging audiences. It helps planning activities, carrying out remedial action where needed, developing new communication strategies, carefully selecting contents and working methodologies, promoting self-training opportunities for the staff and the audience. Furthermore, it allows the institution to assess the coherence of its activities with its mission, role and social value.

The social report of a cultural institution/organisation, in fact, is measured on how effectively it fulfils the goals set in its mission and responds to the needs of the surrounding community and territory. Contemporary cultural institutions/organisations are markedly visitor-oriented; therefore, they have a clear interest in evaluating visitor satisfaction, which is supposedly proportionate to an institution's ability to meet the objectives, expectations and motivations of its audiences. Evaluation, however, has traditionally been and still represents a challenge for the sector. The cultural experience, in fact, is unique and not easily comparable with school experiences or the experience in other lifelong learning contexts; it is cognitive, emotional and sensory at the same time; it is unregimented; it is connected with the physical and social context in which it takes places; and finally, it depends on the cultural background, motivations and interests of the visitor. Impacts (other terms have also been used to describe the changes triggered by a cultural experience, such as effects, results, outcomes) may take different forms in different times, which are often unpredictable; some outcomes are not easy to identify, let alone to measure, also because visitors/participants themselves may not be aware of them. Moreover, audiences are diverse in terms of mental structures, expectations, pre-existing knowledge or ideas on what to look for this reason it is not possible to carry out evaluation as if visitors were an undifferentiated entity. Visitor experience is highly individual; it depends on the cultural inclinations, pre-existing knowledge and motivation of each person; finally, for the visitor it is extremely important to actively create something new and

meaningful, which does not necessarily correspond with the objectives and expectations of the institution/organization, or with the acquisition of competencies and skills. Therefore, it is not easy to determine what to evaluate, and according to which parameters. Until recently, learning in the cultural context was the most frequently adopted criterion for evaluation; however, the information based on this parameter can be unreliable or insufficient to understand the impact of a cultural experience, because learning may not be among a visitor's/spectator's goals, or may become apparent at a later stage; furthermore, an exclusive focus on this specific aspect may lead to overlook other potential outcomes, whether expected or unexpected. Finally, in the cultural field very seldom there are professionals specialised in evaluation; this requires methodological as well as disciplinary know-how which is not part of the traditional training and cultural background of cultural workers. All of these problems have hindered cultural institutions/organizations from using evaluation as an ordinary practice and from developing an expertise in this field; this is why evaluation, despite its huge potential as a tool for self-reflection in museums, still represents a major issue in this sector.

Evaluation issues increase in parallel with the wider social role of cultural institutions/organizations today. In fact, they are going through a major transformation in terms of goals, cultural approaches¹⁰ and responsibilities, which imply changes at a cultural, professional and management level; cultural policies are shifting from an institutional role based on conservation, research, communication to new, more visitor- and community-oriented social roles. Contemporary cultural institutions/organizations are increasingly becoming agents of social change, addressing audiences with different ages, educational attainment levels and cultural backgrounds¹¹. Socio-cultural

¹⁰ See for example *LEM Report n. 7: New trends in the 21st century museums*, August 2013, <http://www.lemproject.eu/WORKING-GROUPS/museums-in-the-21st-century-1/7th-report-new-trends-in-museums-of-the-21st-century>; Department of Culture, Media and Sport, *Understanding the Future Museums and 21st Century Life - A summary of Responses*, http://webarchive.nationalarchives.gov.uk/+/http://www.culture.gov.uk/images/publications/understanding_the_future_responses.pdf
American Association of Museums, *TrendsWatch 2012. Museums and the Pulse of the Future*. http://www.aam-us.org/docs/center-for-the-future-of-museums/2012_trends_watch_final.pdf?sfvrsn=0

¹¹ The Convention on the Value of Cultural Heritage for Society (Council of Europe Framework; Faro, 27/X/2005) calls for an ethical use of the cultural heritage, for the benefit of society as a whole, its quality of life, social cohesion, the valorisation of cultural diversities and intercultural dialogue.

inclusion is increasingly being included in the cultural institutions/organizations institutional goals; the emphasis is on developing programmes and activities aimed not only at attracting under-represented audiences with a view to increasing their education, but also – and more ambitiously – at improving the quality of life of individuals and communities and at reducing the risk of social and cultural exclusion. The question, then, is: how and with which tools can the socio-cultural effectiveness of a cultural institution/organisation can be assessed?

Example

DIAMOND (www.diamondmuseums.eu)¹²

Key words: social dialogue; use of ICT; creative partnership; audience development; staff training

Description

DIAMOND - Dialoguing Museums for a New Cultural Democracy is a project funded by the European Union in the framework of the Lifelong Learning Programme.

The project's main goal is to encourage the use of Digital Storytelling in scientific museums, as a tool for self-expression and for communication with others which helps removing cultural barriers. The development of narratives and videos allows to acquire new technological skills on the one hand, and to expand one's own creativity on the other; it also fosters inter-generational exchange in those projects where elderly people are involved. This goal, which is at the core of the DIAMOND project, is complemented by other important objectives: to analyse the educational activities already carried out in museums of partner countries and addressed to groups with special needs; to provide a training in DS for the museum professionals involved; to identify methodologies and tools for an accurate evaluation of the social impact of the activities carried out by museums; to promote the role of science museums as key actors for knowledge-building and personal growth, as well as vehicles for

¹² <http://www.diamondmuseums.eu/downloads/Handbook-English.pdf>

combating social exclusion and alienation; to apply the achieved results at a scientific, methodological and practical level.

Evaluation indicators for the DIAMOND project

In a number of scientific museums across the world, evaluation has become a well-established practice, also through the setting up of permanent observatories; the open access publication of research in progress¹³ on evaluation by the Natural History of London is an excellent example of thoughtfulness on the efficacy of the institution's cultural mission. These studies provide valuable information on visitors, their expectations, interests, degree of satisfaction, and have informed audience development policies. On the other hand, research on the impact of museum experiences on different aspects of the visitor's personality is still relatively uncommon due to the complexity of establishing criteria, parameters and indicators for evaluation; moreover, the little studies available focus on "regular" museum-goers, rather than on marginalised or disadvantaged citizens, who do not visit museums and often do not even have socially "inherited" representations of them. In DIAMOND's case, new visiting patterns (whose outcomes were rather unpredictable, so much so that the activities carried out were considered pilot projects) were experimented with new audiences. No information was available on the target groups' cultural attitudes, language literacy, interests etc. (in fact, it turned out that most participants did not know scientific museums or other typologies of museums), let alone "tailor-made" evaluation systems.

The evaluation criteria adopted for DIAMOND are the following:

a) the museum impact is highly personal, and every individual perceives it as a unique experience; as a matter of fact, participants involved in the project could have perceived it in a completely original and unpredictable way; for this reason, it was deemed appropriate not only to offer participants a range of opportunities for self-expression (digital stories, texts, drawings, pictures, artistic products, videos etc.), but also to adopt non-standardized data collection systems, so as to increase the chances to detect different individual reactions.

¹³ Visitor research and evaluation: Methods, Exhibition evaluation; Learning programme evaluation.

b) museum activities can have an impact on competencies and skills, but also on many other aspects of a visitor's personality traits, such as creativity, interest, inspiration, values, motivations, as well on emotional, aesthetic, linguistic intelligence etc.; as project participants had different cultural (and spiritual) backgrounds and educational attainment levels, it was very difficult to foretell the impact of pilot projects and of the Museum on these aspects; therefore, it was deemed appropriate to use data collection and evaluation systems which would allow to detect potential effects on as wide a range of mental, emotional, sensory and behavioural faculties as possible.

c) drawing inspiration from constructivist psychology, the value of cultural experiences was associated not only with outcomes or products, but also with processes; in the case of DIAMOND participants, it was difficult to predict the outcomes in terms of the digital stories produced, but it was interesting to evaluate how and to what extent participants were involved in preparatory and museum activities both from an individual cognitive/emotional point of view, and in a social interaction perspective; therefore, behaviours of participants were also observed and evaluated.

d) always with reference to constructivist psychology, cultural/educational activities were understood as capable of promoting new approaches, ideas and solutions, rather than simply aiming at a good performance. In DIAMOND's case, changes triggered by the museum experience which could be either detected by the museum staff or perceived by participants themselves in terms of knowledge, interests, attitudes, values, behaviours and/or other personality traits, were adopted as parameters for evaluation.

As for impact/change indicators, the project used the Generic Learning Outcomes-GLOs (MLA, 2008) and the Generic Social Outcomes-GSOs, which comprise qualitative and interpretive, as well as quantitative, categories: awareness, knowledge and understanding, engagement and interest, attitudes, behaviours, skills and "other". GLOs recommends further indicators within the five main categories, "Knowledge and understanding, Skills, Activity behaviour progression, Enjoyment inspiration creativity, Attitudes and values", thereby attaining a highly sophisticated level of enquiry and data collection. The key principle underpinning GLOs is to gather information on what visitors

assert/think they have learned, experienced, changed through the museum experience. The new approaches to evaluation recognise the social value of the museum as an intrinsic and instrumental “cultural” contribution, for example towards the promotion of knowledge, attitudes, inspiration, creativity and empowerment of individuals and communities, but also social cohesion, active citizenship, health and well-being, equality and justice, integration of marginalised citizens. GSOs assess knowledge and lifelong learning as values connected with citizenship and social inclusion, and recommend three main guidelines (*Stronger and Safer Communities, Strengthening Public Life, Health & Well-Being*), comprising 14 indicators to measure the efficacy of museum activities.

These criteria and strategies were applied to the evaluation both of digital stories and of the other experiences and processes or products of DIAMOND participants.

Evaluation carried out on the texts of digital stories, questionnaires and conversations of groups of participants revealed an increase in knowledge, interest, curiosity, motivation, enjoyment, participation and personal engagement, development of skills, changes in ideas, attitudes and values, also confirmed by the observation of behaviours, the development of products and the organisations of events, new visits etc.

The aesthetic approach to the Museum was predominant and pervasive in most participants (individuals with hearing impairments included) throughout the project; the analysis of texts and interviews shows that some of the key words most frequently used with reference to both animals and displays were “beautiful, wonderful” and also “magnificent, astonishing” (e.g. elderly people). This emphasis on beauty undoubtedly encouraged the personal expression of emotions and knowledge in digital stories as well as in drawings and other artistic or poetic works. All products show personal involvement, engagement and participation, also confirmed by the direct observation of participants’ behaviours during museum activities by at least one member of the project team, as well as by the several pictures taken as part of documentation.

Following the GSO model, it was also possible to evaluate the project from the point of view of its social impact. The DIAMOND experience represented an

opportunity for all participants in terms of social interaction, social and cultural exchange, valorisation of different knowledge systems and cultural backgrounds, mutual recognition and appreciation; all digital stories, texts, conversations, pictures and videos provide evidence of friendly, confident and constructive relationships, and include explicit reference to the pleasure of having met and worked together. Some youths (but also elderly people) took on an important role, both by reporting on museum activities and sharing their experience with their respective communities/groups, and by organising museum visits for other people; they enjoyed this experience, as some comments clearly show (e.g. *the thing I liked most was to tell others ...*). Many participants, both young and old, enjoyed the visits and exchanges at the Museum as joyful experiences, and expressed this feeling in their stories, questionnaires or interviews.

Partners/Organisation in charge

Project partners include a diverse range of organisations and institutions, all committed to working for the promotion of cultural participation as a vehicle of social inclusion and as a vital component of lifelong learning.

ECCOM – European Centre for Cultural Organization and Management (project leader) has been working since 1995 in the field of cultural management with the aim of promoting an interdisciplinary approach to cultural organisations. (www.eccom.it).

Melting Pro - Laboratorio per la Cultura is a permanent workshop committed to the development of ideas, proposals and initiatives for a wider access to culture and heritage at the national and European level. (www.meltingpro.org/it).

The *City Museum of Zoology of Rome* has a long history, a rich collection and a great experience in the development of pilot projects aimed at promoting social inclusion. The Museum has carried out several educational projects and activities within and beyond its walls, addressed to special groups and with a particular focus on lifelong learning (www.museodizooologia.it).

The *National Museum of Natural History “Grigore Antipa” of Bucarest* has a leading role in zoological research and cooperates with other museums, universities and research centres in Romania and worldwide. The Museum offers a diverse

range of educational activities, and in the past few years has been devoting growing attention to adult groups in marginalised situations, by promoting respect and knowledge of biodiversity (www.antipa.ro).

The *Museum of Natural Sciences “Ion Borcea” of Bacau* is engaged in scientific research, the conservation and valorisation of its collection, and educational projects. Its scientific activity is increasingly combined with a growing awareness of the complex relationship between the museum and its diverse audiences, with a particular attention devoted to groups with special needs (<http://www.adslexpress.ro/muzstnat>).

The *Museum of Natural Sciences of Valencia* is committed to the active involvement of its audience in educational activities, and organises meetings and workshops also targeted to special needs groups, such as the inmates of Picassent’s jail (<http://www.museosymonumentosvalencia.com/museos/museo-ciencias-naturales/>).

All partners co-operated with social and health care organizations during the development of the project.

Key issues

The evaluation tools and criteria employed revealed the depth of DIAMOND’s impact, in terms both of the digital stories produced, and of the pilot projects which made them possible. Moreover, the evaluation’s ability to measure a wide range of individual and social potential effects (cognitive, emotional, spiritual, connected with values, skills, relationships, participation etc.) confirms the great richness and complexity of the museum experience, the substantial diversity in museum visiting patterns depending on the different target groups, and the correlation between impact and individual backgrounds, prior knowledge, motivations, expectations etc.; above all, evaluation showed the huge potential of scientific museums in initiating a fruitful intercultural dialogue with marginalised citizens or with individuals experiencing difficulties in communication and participation, as well as in playing a decisive role in the inclusion and involvement of people from different social and cultural backgrounds. These final considerations encourage us to further test/explore this field of activity, mostly unknown to museums, but apparently very

promising. Finally, evaluating the DIAMOND project created the conditions for the Museum to assess the value of its activities and social role: DIAMOND's success in promoting lifelong learning and inspiration, the number and diversity of new visitors, an increased regularity and awareness in the contact/dialogue with the local community, the contribution toward socio-cultural inclusion, are all elements providing a positive feedback on the Museum's mission and its ability to promote cultural democracy, social cohesion, a better quality of life for all citizens; finally, they offer useful guidelines to shape socially more effective and sustainable museum policies.



Co-funded by the
Creative Europe Programme
of the European Union