

europeana network association

IMPACT LITE TASK FORCE

Report and recommendations

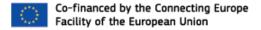




Table of Content

Table of Content	2
Task Force Participants	3
Introduction	3
Outputs	3
Recommendations Proposal for a Follow up Task Force - Impact Lite #2	4
Methodology Participants Profile. Designing the Learning Experience Impact Lite Crash Course change pathway Designing the content of the Course Overview and approach Phase zero Phases one and two Phases three and four	5 7 9 9 10 10
Next steps: implementation	12
Concluding Remarks	13
Appendix 1: Persona Canvases	15
Appendix 2: Crash Course Outline Phase 0 Phase 1 Phase 2 Phase 3	16 16 17 18 20
Appendix 3: Homework Assignment Phase 2 Case Study: Europeana Massive Open Online Course Outcomes to measure: Stakeholders: Homework Resources	23 23 23 23 23 24
Homework Templates	24



Task Force Participants

- Malene Lomholt Busch
- Antje Schmidt
- Maria Drabczyk
- Raul Gomez Hernandez
- Lowri Jones
- Dafydd Tudur
- Nicole McNeilly
- Marco Streefkerk
- Ad Pollé
- Olivier Schulbaum (TF co-lead)
- Nadia Nadesan (TF co-lead)

Introduction

The Europeana Impact Lite Task Force was created to develop a crash course structure that would support the use and implementation of the Europeana Impact Playbook. The Impact Lite Task Force had a dedicated space on the inDICEs platform, a platform for cultural heritage institutions around the EU. The main resources used to develop the course was the Impact Playbook and its related resources so that the course design could also be influenced by the idea of designing for impact. The task force also used a set of canvases with MIRO boards by Platoniq.

Outputs

The task force resulted in a number of outputs and insights while ideating what an impact lite crash course could look like. The outputs of the task force are as follows:

- empathy canvas that focuses on the work life of a prospective participant to best imagine how the crash course could align with their existing skills and work space
- personas to orient the crash course design
- an outline using the change pathway of how the course can be designed around impact
- the development of a course creation canvas
- an outline on elements for each Phase of the Playbook to incorporate into an impact crash course
- materials and assignments to accompany Phase two and three of the playbook
- a focus on Phase zero that is, an approach to setting the context around the value of impact assessment and an impact approach in an organisation's work
- recommendations for an Impact Lite Playbook and second Task Force

These outputs are explored in greater detail in the report.



Recommendations

- Instead of focussing on a train the trainers methodology, an Impact Lite Playbook should be developed to be both a **learn-by-doing methodology and a toolkit**.
 This should have learning tools (e.g. videos, quizzes, downloadable exercises) built in. It should explore other standards of presentation and interactivity (i.e. not being a static PDF) and the content explored in the first Impact Lite Task Force.
- This requires the creation of an **Impact Lite Playbook**.
- An Impact Lite Playbook should create consistency between the four Phases
 of the Impact Playbook methodology. The existing three Phases have value as
 standalone in-depth resources that practitioners can draw on. Each Phase and its
 resources should be updated iteratively to remain relevant to their users.
- **Phase four should be developed** by Europeana as planned for 2021/2022, alongside and with the support of the Impact Lite Task Force #2.
- A **second Impact Lite Task Force** is required to create the Impact Lite Playbook and relevant tools and resources (as required).
- A second Impact Lite Task Force should be **co-led by Europeana Foundation** and Platoniq.
- Future efforts should not focus on creating a cohort of trainers who can further train others to be impact practitioners. A learning by doing Impact Lite Playbook, focusing on the core elements to apply, should create a cohort of those who are using and can support others to use the tool.

Proposal for a Follow up Task Force - Impact Lite #2

To follow up this task force a new task force is proposed for the Impact Lite Crash Course execution. A new task force would build upon an existing body of work to fully work on the concrete logistics, develop strategic partnerships, and source the overall materials and human resources to fully realise the course within the Europeana Capacity Building Framework.

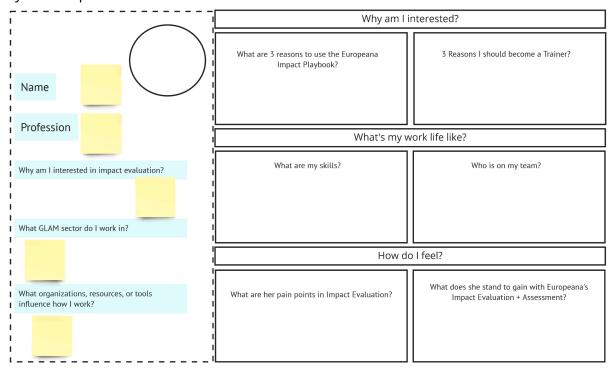


Methodology

1. Participants Profile. Designing the Learning Experience

Participants first created their own series of personas or profiles of participants they believed would be interested in taking the crash course.

The prospective participants were created with the following empathy map developed by Platoniq:



The canvas was created on MIRO. This canvas focuses on the work environment and skills to best align the Impact Lite Crash course with possible career goals and interests. At the end of the first two assemblies, ten personas had been created. They represented these three distinct areas of people who work within GLAMS and cultural heritage:

- Four heritage practitioners
 - Project Manager working with collections move team
 - Engagement Manager working in a gallery or museum
 - Research and Knowledge Exchange manager
 - Project coordinator
- Five people who consult with CHIs and GLAMs
 - Project coordinator (working within a specifically local context)
 - Fundraiser / Fundraising Consultant
 - Co-Lead organiser at art + feminism
 - o Member of the European Cultural Foundation supervisory board
 - Information Manager
- One person who represented special interest groups
 - Experiential trainer, facilitator, and social and environmental justice organiser

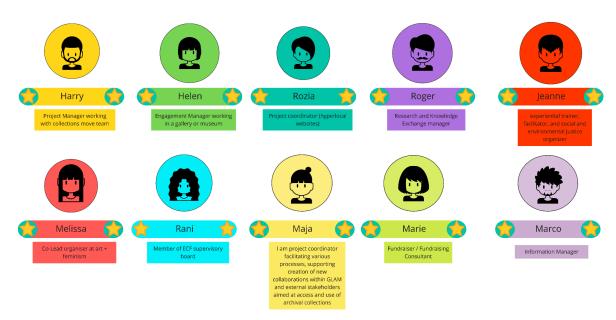


Figure X. The ten created personas.

A sample of the heritage practitioner personas is included in Appendix 1.

These personas serve as design tools to evaluate the accessibility, impact, and effectiveness of any course design. Through the creation of the personas a number of insights were determined across these sectors.

Participants might be interested in an impact lite crash course because they:

- Are keen for their project to make a difference to the local community
- Aare involved in behind-the-scenes work they want to show how their work is making a difference / impact
- Are motivated by intrinsic value & social impact
- Want to strengthen their advocacy efforts
- Want tools to use in project development & ongoing improvement
- Need to justify the value of their work to funders and organising bodies
- Need or want to understand the value of their work

Reasons to be an impact lite trainer include to:

- Scale impact practice and make it more visible within the organisation
- Build connections with other professionals in the sector (if planning to train externally)
- Improve facilitating skills
- Promote the value of impact assessment in GLAM
- Support the heritage community
- Personal development
- Improve one's reputation
- Pass on 'creative thinking' skills to other



- Support small teams getting funding
- Better understand the process and deploy or embed this way of thinking more systematically
- Promote the value of impact assessment in fundraising for the heritage sector

Pain points they have in impact assessment might be:

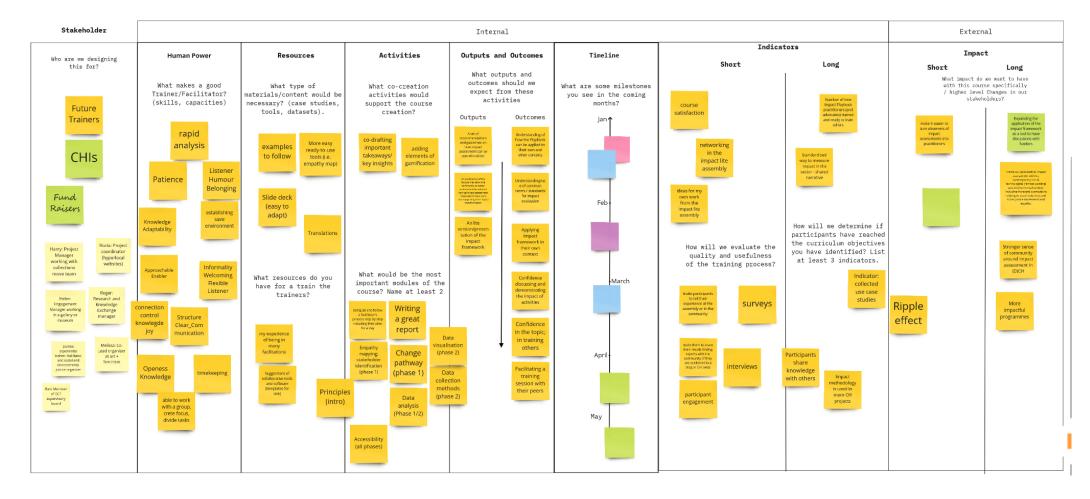
- Encouraging others to work in a new way
- Organisation driven by stats rather than difference made
- Difficult to find specific resources that relate to the heritage context and impact
- There is no shared understanding of the broader value and impact of digital heritage, looking beyond the quantitative metrics (when the real value lies in qualitative perspectives)
- Impact assessment is a long process & organisations have limited resources to invest
- Challenge to know best practices
- Institutions constantly need to prove the value of their work Impact assessment is often a 'nice to have' or maybe 'should have' but not 'must have'

These insights were collected to help future course or resource creators to understand what might be most useful to future participants/trainers and to develop further materials (see the recommendations).

2. Impact Lite Crash Course change pathway

To design for impact, a change pathway for the crash course was created taking into consideration the profiles of the personas created.





This canvas was created to emphasise that the crash course should also be designed for impact and to embody the message the course wants to communicate which is that impact matters in design and execution of a project.

The responses to each of the questions asked in the change pathway exercise were captured were the resources and materials that assembly participants then used to then fill in and develop the draft for an Impact Lite Crash course.

3. Designing the content of the Course

a. Overview and approach

The course was conceived of as an activity that would follow the structure of the Impact Playbook. For example, each course segment, section or unit covers a Phase of the playbook. One edition that was made was that the first unit would be a Phase zero that would highlight the importance and value of measuring impact within an organisation.¹

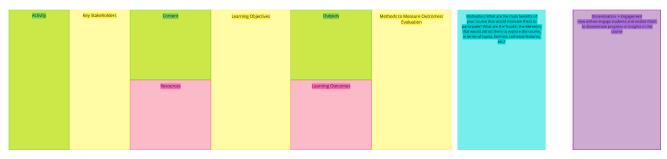


Figure X. XX

To develop the course content a canvas was developed for course creation, also based on the change pathway. The course canvas was structured to incorporate ideas that had been shared in previous meetings of the Task Force.

Using this canvas the Impact Lite Assembly developed an outline for activities, learning outcomes, and content for what the Impact Lite Crash Course might look like. The course reflects how the Impact Playbook might be operationalised and what each Phase would look like as a series of hands-on learning activities, participatory workshops, and multimedia materials for participants to asynchronously engage with.

Below is the full image of the canvas used by the task force to explore the different Phases of the Playbook, outlined in more detail below.

¹ This follows the structure of the 2020/2021 Europeana Impact Community webinar series. See more on impkt.tools

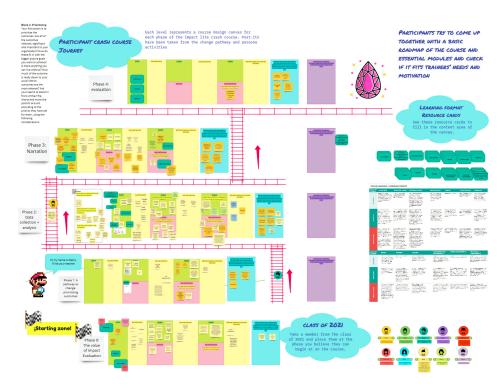


Figure X. The full canvas used by the Impact Lite Task Force.

b. Phase zero

Phase 0 is envisioned as an exploration of the factors that allow the community to better understand the value of having impact assessment integrated in their work and supporting their digital transformation. One suggestion that was proposed was to host an 'Impact Awareness' workshop building off the work of Maaike Verbek.

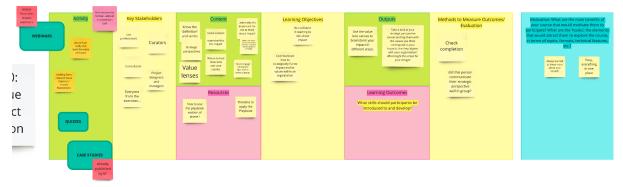


Figure X. A snapshot of the MIRO board of the canvas used to develop Phase 0.

c. Phases one and two

Phase one provides a full and interactive methodology for participants to follow. However, Phase two was developed as a guidebook or resource to consult rather than a process. It lacks the step by step feel and guidance of Phase one. It was felt by members of the Task Force that future developments of Phase two should incorporate more of an instructive, training approach, as data collection is an area of concern and an area where many heritage practitioners lack skills and/or confidence.

To perform a closer reading of Phase two and create a simulation of what participants might have to go through to conduct an impact assessment, a homework assignment was created. The homework assignment took an existing, detailed Europeana Impact Assessment and through selecting specific details of the case participants were asked to develop methods and indicators to measure impact. The full assignment is included in Appendix X.

An important observation from going through Phase two was that it was very technical and unlike Phase one it did not have the throughline of a case study for the reader to see the process in action. In future it might be helpful to have a case study or example that makes the methods more accessible to the reader².

d. Phases three and four

Phase three was still in development at the time of the Task Force. To fill the gap of having Phase three an empathy map for the reader of the impact assessment was created. The empathy map focused on how and what the course participant wants to communicate to their audience and what reactions they would like to elicit from their audience.

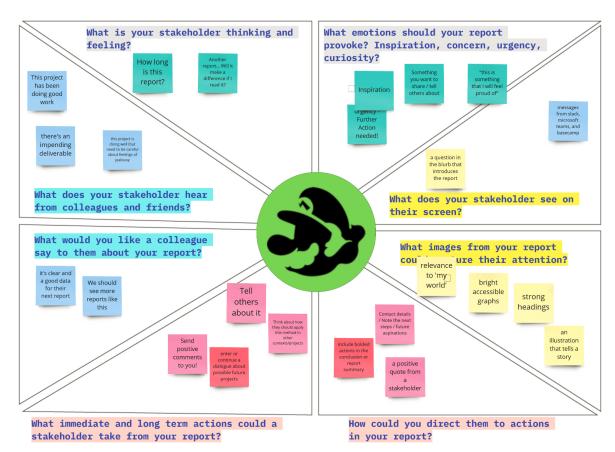
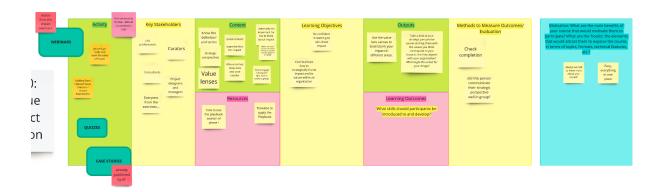


Figure X. Empathy map created for the Impact Lite task force Phase three section.

² This insight and recommendation has already informed the design of Phase three of the Playbook.

Furthermore, Task Force members were invited to review the output as it was being developed and, with some of the contributing authors being part of the Task Force, different interactive and instructive elements (e.g. downloadable worksheets) were included in the beta and final version.



Next steps: implementation

Reflection on original objectives

An important aspect to consider is the logistical considerations in terms of the amount of time and commitment expected especially for the first trainers of the course. In the best case scenario, the first 'generation' of trainers would set the precedent for future participants and therefore there might be an extra commitment to adjust, reiterate, and build on tools that would be used in the future of the course. This, however, requires the investment of significant resources, commitment and time. Through the process of conducting the Task Force, we have come to the conclusion that **the most effective use of time would be to create a resource that trains practitioners by using it**. Namely, that each stage of the Playbook is accompanied by fuller introductory and learning materials.

Certification

If a course would be designed, then the question remains of whether and how to evaluate a course participant's work and certification requires further consultation with an expert. For now, and considering the proposed plans for the Impact Lite TF#2, certification is not a requirement.

Governance

Governance of a cohort of trainers was discussed. For sustainability reasons, it is not recommended that such a cohort is intentionally created. Rather, **practitioners who 'learn by doing' could be more actively welcomed into the Impact Community**. A new tool, Listserv, is being set up to encourage more interaction between members of the Impact Community.



Contributing to a bigger picture

To maximise the impact of the work performed in the Task Force synergies should be made with the work currently undertaken by the Europeana Foundation in the Capacity Building Framework. The Task Force findings could be used to support the development of the new Europeana-based framework focusing on processes and mechanisms needed to support knowledge exchange and training in the network and likewise the Capacity Building Framework will help us agree standards and approaches of the Impact Lite methodology.

Testing an Impact Lite approach - exploratory condensed workshop

The participants of the Impact Lite Crash Course Assembly have proposed a second Task Force, that would develop a workshop to test and validate ideas developed during the assembly. Now that there is clarity about the direction of activity and having tested our approach through the first Impact Lite Task Force, this second Task Force would launch the idea of the crash course and make concrete progress towards making it a reality. This Task Force has set in place the components that would form the majority of this workshop, for example, by identifying personas that inform us who could take part and by setting out the possible workshop content.

Proposals for the condensed workshop include:

- (Phase zero) Communicating the value of impact assessment based on the playbook methodology; explain why impact assessments are needed and show the difference between impact work versus traditional forms
- Showing an overview of the whole process, from Phases 1 to 3
- Implicitly demonstrating how easy is to apply the impact playbook and that it is open for all
- Explicitly asking participants:
 - How much time do they have to learn about impact evaluation
 - 'What does a 'crash course' mean?'
- Engaging participants in interactive exercises and knowledge-sharing, including opening and closing the workshop with mentimeter surveys (assessing expectations and evaluating the experience respectively).

Observations and outputs from the workshop could then help us to select the most relevant tools and elements from all the Playbook Phases and to create exercises around them that could be used in an Impact Lite Playbook (see recommendations).

Concluding Remarks

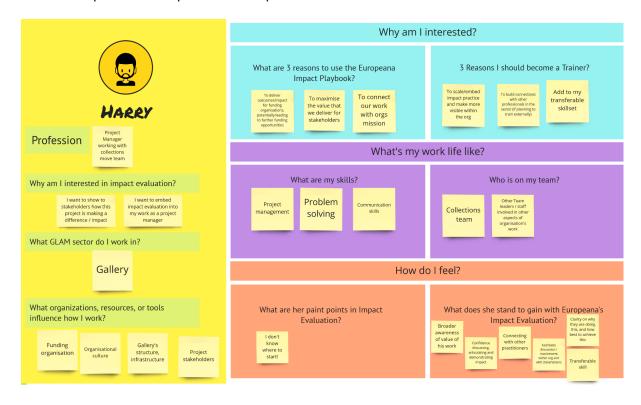
We recommend that the Task Force is continued (as Impact Lite Task Force #2) to further apply what has been learned in this first iteration.

The Europeana Impact Playbook should take into account the challenges of those heritage organisations operating at a much smaller or more challenging, less well-resourced scale (e.g. local, time poor or volunteer-led organisations). Materials should be developed and their use explained in ways that are more accessible to a wider audience. Using the Playbook should in itself be a learning and training experience, with peers being supported and finding the confidence to take the parts that work best for them and apply them in their own contexts. The whole experience should be developed in accordance with the wider Europeana Capacity Building Framework. The recommendations for an Impact Lite Task Force #2 pursue this thought further.

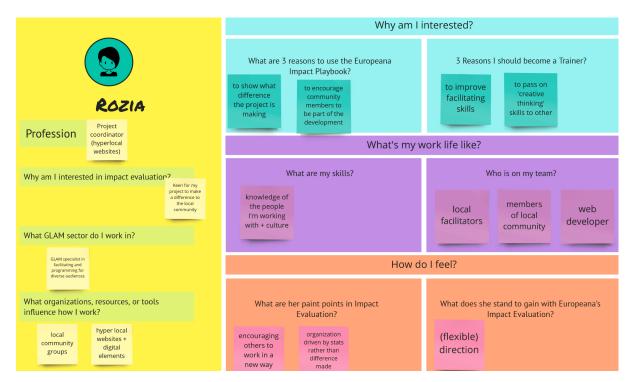


Appendix 1: Persona Canvases

GLAM/CHI practitioner persona sample:

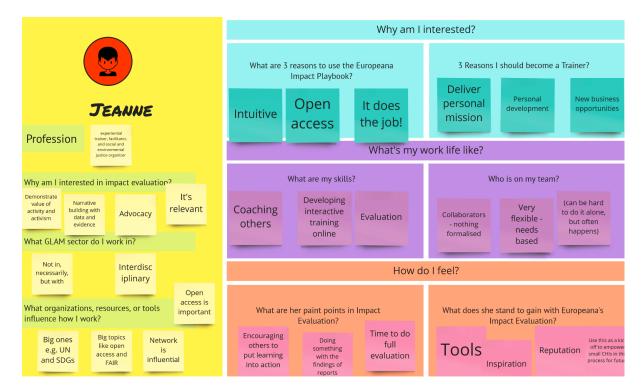


Sample of a person who consults with GLAMs and CHIs





Person who represents third party interest groups:



Appendix 2: Crash Course Outline

I. Phase 0

Phase 0 is envisioned as an exploration of the factors that allow the community to better understand the value of having impact assessment integrated in their work and supporting their digital transformation.

- Activity:
 - 1. Asynchronous
 - videos from the impact webinars
 - case studies that show the importance of impact assessments
 - quizzes for participants to assess their knowledge
 - Discussion threads
 - 2. Synchronous
 - A workshop to build from relevant Value Creation / Impact Frameworks
- Key Stakeholders:
 - 1. CHI professionals
 - 2. Curators
 - 3. Consultants
 - 4. Project designers and managers
 - 5. Everyone from the exercises...
- Content:
 - 1. Relevant 'definitions' and terms

- 2. Strategic perspectives
- 3. Value lenses
- 4. Evaluating a social context for opportunities for impact
- 5. Information on where find resources and case studies
- 6. Materials that explain the added value of the impact framework: point to convince people to go further
- 7. Materials on how to engage colleagues? tips. how to create a group.
- Resources:
 - 1. Should explain how to use the playbook section of Phase I
 - 2. Timeline for how to apply the Playbook
- Learning Objectives:
 - 1. Be confident in starting to talk about impact
 - 2. Communicate how to strategically frame impact and its values within an organization
- Outputs:
 - 1. Participants should use the value lens canvas to brainstorm impact in different areas.
 - 2. Participants should take a look at the strategic perspective canvas and tag them with the values that impact and assess if they are aligned with the organization? What might this entail in terms of design?
- Methods to Measure Outcomes/ Evaluation:
 - 1. Check completion of activities
 - 2. Did this person communicate their strategic perspective well in group?
- Motivation: What are the main benefits of your course that would motivate them to participate? What are the 'hooks'; the elements that would attract them to explore the course, in terms of topics, formats, technical features, etc.?
 - 1. Always wanted to know more about your impact?
 - 2. Easy with everything in one place

II. Phase 1

Phase 1 should inspire participants to continue their journey have learning the importance of impact in Phase 0. In Phase is about paying attention to the skills one should have as a trainer. It should communicate the skills required to communicate the different concepts with the impact playbook.

- Activity
 - 1. Asynchronous
 - 2. Synchronous
 - Workshops that are light and easy
- Content
 - 1. Empathy Map
 - 2. Change pathway
- Resources

- 1. Reader: Impact Case Study Assessment from Europeana
- Learning Objectives
 - 1. Participants by the end should know how to apply the Phase 1 process to design an impactful programme (and impact assessment)
- Outputs
 - 1. data collection: surveys
 - 2. data collection: observations
 - 3. data collection: existing data points
 - 4. Each participant should create an empathy for themselves and for a prospective participant in the workshop. They should then ask themselves how they can categorise stakeholders, by age, participation, profession?
 - 5. Use the change pathway canvas and fill it in with the two perspectives from your empathy mapping.
- Learning Outcomes
 - 1. Applying impact framework in their own context
 - 2. What does this actually mean?
- o Methods to Measure Outcomes/ Evaluation
 - 1. Participants embed a method to design impact in their project design activities
- Motivation: What are the main benefits of your course that would motivate them to participate? What are the 'hooks'; the elements that would attract them to explore the course, in terms of topics, formats, technical features, etc.?
 - 1. Broader awareness of value of their work
 - 2. Helps her asking the right questions at the beginning of a project
 - 3. Inspiration

III. Phase 2

This Phase needs to emphasize teamwork. Additionally, participants should be encouraged to think of their own experience as soon as possible and apply it to their own project when considering what data to collect and analyse.

- Activity
 - 1. Asynchronous
 - E-Lectures: a speaker presents information, directly addressing the audience
 - Readers: Statistical validity for dummies; working on drawing conclusions
 - Animated Videos
 - Practical Assignments
 - Quizzes
 - 2. Synchronous
 - Webinars
 - Workshop on developing indicators
 - Workshop on data collection



- Key Stakeholders
 - 1. Communications people
 - 2. Project leads
 - 3. Data people
 - 4. Project delivery team
 - 5. As a volunteer level be more considerate of their time

Content

- 1. An example case study
- 2. Information on how to choose the right method
- 3. Message to communicate: spending money is not required for a good analysis
- 4. Advice on who to quote in a report
- 5. what can data look like in a more approachable way
- 6. A lighter version with a more community level orientation
- 7. examples of data

Resources

- 1. Europeana question bank
- 2. Lists of indicators
- 3. An example of a complete data collection plan
- 4. Worked through coding examples e.g. on Google sheets
- 5. Exercises on statistical validity
- 6. List of tools

Learning Objectives

- 1. selecting stakeholders to communicate their point
- 2. Confidence in selecting data collection methods
- 3. Confidence in data analysis

Outputs

- 1. Write a 100 word summary to be presented to the group about their work so far. Prioritise the outcomes from their change pathway and brainstorm methods to use to measure each one.
- 2. taking existing cases as homework to compare results
- 3. A set of conclusions (findings) that answer their research question
- 4. take an inventory of their existing data and how that might match existing methods

Learning Outcomes

- 1. Impact data collection embedded into workflows
- 2. Understanding/use of common terms / standards for impact evaluation
- 3. DIY data analysis skills
- 4. Confidence discussing and demonstrating the impact of activities
- 5. How are learning outcomes in informal education spaces frequently expressed? How do they convert to indicators?.. "
- Methods to Measure Outcomes/ Evaluation
 - 1. create a change pathway for that session and it is an impact assessment and put their participation in the context of the impact framework



- 2. surveys
- 3. assessing the impact of the session itself
- Motivation: What are the main benefits of your course that would motivate them to participate? What are the 'hooks'; the elements that would attract them to explore the course, in terms of topics, formats, technical features, etc.?
 - 1. Connecting with other practitioners
 - 2. Helping to find good arguments for next proposal
 - 3. Creating their first impact story
 - 4. Tools and resources
 - 5. Clarity on why they are doing this, and how best to achieve this
 - 6. Improve their programme evidence-based
 - 7. Get better at identifying new areas of interest or new audience
 - 8. The data and the analysis
- Notes
- This is the one where we need most training
- tips for online interviews
- maybe a simpler case for the homework
- less text more examples and cases
- Why should donors pay you for doing it?
- how do people use your content after your event
- post event evaluation as a means to collect data
- feels a bit like a standalone resource not connected to the change pathway
- it's very academic
- text heavy
- people often says its impossible to measure impact
- the outcomes and outputs are measurable but make his more clear
- context we're working in are so different and maybe use a smaller scale example because regional orgs have more resources
- more visual
- think of our trainers with a smaller scale i.e. neighborhood or city

IV. Phase 3

- Activity
 - 1. Asynchronous
 - transform Phase 3 into a slide deck for making the report presentation easier
 - Create a dissemination strategy outline
 - Make a resources, tips and tutorials list
 - Proofreading + stakeholder feedback
 - Case studies
 - Webinars

2. Synchronous

- Reflecting on Data Visualization with historical visualisation examples (pre-digital) https://participate.indices-culture.eu/processes/cocreation/f/6/posts/6
- Visualising the data and your narrative charts, graphs and much, much more
- Validate and review their narrative

Key Stakeholders

- 1. Communications colleagues
- 2. Senior colleagues
- 3. Colleagues who were/are/willbe involved in the delivery of the 'impactful' project/activity

Content

- 1. examples to follow
- 2. Tutorials
- 3. Checklists
- 4. interactive exercises using the ideas from Phase 3, showing the steps, workflows, etc.
- 5. Guides/tips
- 6. Case studies (hypothetical or real)

Resources

- 1. some great canvas templates
- 2. More easy ready-to-use tools (i.e. empathy map)
- 3. Time+skills of those delivering the dissemination strategy
- 4. Slide deck (easy to adapt)
- 5. Table templates for planning the whole process

Learning Objectives

- 1. Aware of story-telling principles and value for impact narration
- 2. Can draft an impact story
- 3. understand the value of words and tailored storytelling
- 4. assess which data is most important for audience
- 5. matching visual types to data types making a quick quiz

Outputs

- 1. A great impact narrative
- 2. Facilitating a training session with their peers
- 3. personal list of who will receive the 'report' + dissemination plan
- 4. Infographic

Learning Outcomes

- 1. Confident to draft an impact story
- 2. Think about different storytelling mediums what about telling an impact story through video?
- Motivation: What are the main benefits of your course that would motivate them to participate? What are the 'hooks'; the elements that would attract them to explore the course, in terms of topics, formats, technical features, etc.?



- 1. New ways of engaging staff with impact analysis
- 2. Gain more acknowledgment for the Expertise of the archive
- 3. Confidence discussing, articulating and demonstrating impact
- 4. Confidence with the tasks (i.e. time organizing, choose the great points of the impact research)
- 5. Telling new stories about your organisation and its value / impact



Appendix 3: Homework Assignment Phase 2

Case Study: Europeana Massive Open Online Course

The Europeana Massive Open Online Course (MOOC) helps teachers use digitised cultural heritage material in their classrooms. A MOOC is a model for delivering learning content online to virtually any person with no limit on attendance.

Through this course, participants learned how to navigate the Europeana Collections website, explored and became familiar with the various Europeana apps, tools and materials, and learned how to build learning activities using Europeana Collections resources. The course ran for 6.5 weeks, with a total number of 5 modules (one module per week) and 1.5 grace week so that participants could finalize the remainder of the coursework at the end of the course. The workload for participants was an estimated 3-4 hours per week with a total of 25 hours.

The reach of the 2019 MOOC was quite high, over 3,000 people registered for the English version

Outcomes to measure:

- Improved access to digital cultural heritage for educators
- Strengthened professional networks
- Improved professional skills
- Improved job satisfaction

Stakeholders:

- Teachers
- Ministries of Education
- Europeana
- Students

Homework

- Develop your indicators for each outcome. Divide them between subjective and objective indicators.
- Decide your methods for your indicators. Then briefly outline the tasks needed for your selected methods.
- Everyone with a birthday between January to June please focus on quantitative methods, while July to December birthdays please focus on qualitative methods.



Resources

Template to organise your indicators, methods, and tasks:

 $\frac{https://docs.google.com/presentation/d/1edMty1fRipPYdyjf_I1360I38Novlmn8YqnigL7ppCA/edit?usp=sharing}{pCA/edit?usp=sharing}$

http://www.social-impact-navigator.org/impact-analysis/indicators/develop/

Homework Templates

Case Study Homework

Outcomes	Indicators

Case Study Homework

Indicators	What existing data sources or new data needs to be collected for the indicator?	Methods to collect or aggregate the data



Method:[Insert Method]

Tasks that need to be carried out for this method:

- •
- •
- •

Notes



- Ç pro.europeana.eu
- **y** @EuropeanaEU



