

Impact workshops  
2017  
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# European a

## DEVELOPING THE IMPACT TOOLKIT

Supporting impact assessment  
in the cultural heritage sector 2017



Co-financed by the European Union  
Connecting Europe Facility



# Colophon

## **Credits**

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# Executive Summary

## Digital cultural heritage changes lives... but how and by how much?

Enabling the assessment of impact within the cultural heritage sector has been a long-held ambition of Europeana. Founded on Dr Simon Tanner's [2012 paper Balanced Value Impact Model](#), the work of the first Europeana Impact Task Force led to the integration of an impact framework in the Strategy 2020. Then in 2017, impact was embedded in the annual Business Plan. But we still needed to make a breakthrough.

With the help of our partners we identified what we wanted to build to achieve this goal:

- An easy to follow methodology for undertaking impact assessment specific to the cultural heritage sector,
- Case studies that demonstrate how impact assessment can bring new insights into our work,
- A place for a community to find and share information about impact assessment.



*Brainstorming in an impact workshop*

**We want to make it possible for cultural heritage professionals to take their first steps towards undertaking an impact assessment.**

Using the work we had already undertaken in the area of impact assessment, and using ourselves as a willing subject, we developed an approach to undertaking impact assessment in the cultural heritage sector. The process we followed enabled us to validate our work as we progressed. Each step in the method was tested on our stakeholders. And as we ran workshops we observed what worked well, and where adjustments and tweaks were needed. And then we ran them all over again, learning at each step.

Along with the support and guidance of impact advisors Sinzer, this approach enables us to produce a robust method for undertaking impact assessment. From this we produced the Impact Playbook - a practical tool to help drive change an impact in the cultural heritage sector.

# How To Use This Playbook

Jump to the section that catches your eye. Flick backwards and forwards through the pages following your instinct. When you decide to do an impact assessment, read it cover to cover. The playbook has a clear and simple structure, designed to help you every step of the way.

## Type of activity

-  **Homework**  
Guide to what you need to do to get the most out of the data.
-  **Tools**  
Templates and resources to help you do the job.
-  **Theory**  
Introduction to the ideas behind each step of your impact assessment.
-  **Workshop**  
A step-by-step approach to running your workshops.

## What you need

-  **Who?**  
Who do you need for this exercise?
-  **Why?**  
What is the goal of this exercise?
-  **Time**  
How much time do you need?



## Europeana Impact Playbook

Launched in October, the playbook is supported by a case study documenting the impact research we undertook in the summer of 2017, a website full of impact-related resources and a developing community of professionals who share an interest in impact. It was an immense achievement and we're thrilled with the positive reception our work has enjoyed so far. But we're not stopping there.

We want the playbook to mature into a resource that supports those first tentative wobbly steps of exploring impact until they become a well trodden path. Maintaining our lean approach to product development, we are embracing the most significant lessons we have learned and use them to shape what we do next. We'll nurture the impact community as they

develop, and provide encouraging words and case studies to help them on their way. And we'll extend the scope of the playbook to cover the research, assessment and narration phases of impact assessment - supporting professionals to complete the cycle.

And finally, a principle important to us, is that alongside the tried and tested methods we recommend, we'll continue to push our own boundaries and explore new and developing research and narration techniques. Through our work we want to inspire and guide professionals in the cultural heritage sector to push their own boundaries and embrace the insights that impact assessment can bring.

# Introduction: where we started

**January started with ambition.** We collected a team of colleagues, experts and consultants together and by March we launched our first product: a [website](#) introducing the topic of impact assessment in the cultural heritage sector. It was used as a means to start engaging with people interested in impact within the cultural heritage sector across the world.

As this international community began to slowly grow, so did the language we used - a set of resources became a toolkit, and a methodology became a playbook. This change of language may seem small but it's significant - using fresh, informal and accessible terms draws in and empowers the people we hoped to reach. With that in mind, the Impact Task Force identified components of a toolkit that would help not only undertake impact assessment, but also convince stakeholders and decision-makers that assessing impact is important.

## What we set out to build

- **A clear and practical method** for assessing impact that is supported by canvases, resources and tools that make it simple to follow. Supported by real examples and step-by-step guides that can be used by cultural heritage professionals who have differing levels of experience with impact.
- **Projects and activities** that, together with their current stakeholders, act as testbeds for the development of the method of impact assessment.
- **A community** of cultural heritage professionals interested in impact assessment and keen to develop their collective understanding and practice. Supported by a website, a forum and effective media to make it easier for the community to talk with their networks about impact.

This report describes the steps we followed to iteratively develop the impact toolkit, what we produced from our work, and how we are using what we learned to shape our future work.

# What we did and how we did it

## Lean development: build - test - learn

We knew that we needed to take a big step forward to develop the methods we had tentatively been using into a robust, practical and playbook-worthy method. With Sinzer's expert guidance, the workshops that would form the foundation of the Impact Playbook were developed. This didn't happen overnight though, we used a lean approach to develop and iteratively refine them.

This meant running a series of workshops that focused on exploring the impact of a real-life project or activity, involving that project or activity's stakeholders so that (1) we could learn from the process and improve and (2) the stakeholder could learn more about their impact.

We experimented with our approach for how to run the workshop, as well as how to identify the preparation and post-workshop work required. As we tested each approach, we analysed what we had done against what we wanted to achieve, and used that to help us refine the next workshop.

### Starting the conversation, getting everyone on board

The starting point in assessing the impact of an organisation's activity or project is to get a group of stakeholders together and start talking - about impact, what it is, why it's important and why you want to assess it.

We developed a format to guide this conversation so that stakeholders are immersed in the playbook methodology right from the beginning and so that once everyone is brought into the idea, it's clear how they can move forward with it.

With the help of Europeana Network Association Chair and Task Force member, Merete Sanderhoff, we ran a kick-off workshop for the stakeholders of SMK's new project: SMK Open. We achieved our goals of the workshop by getting a diverse group of stakeholders on board with the idea of assessing the impact of SMK Open and motivating them by showing them how the playbook could help them.

 **Merete Sanderhoff**  
@MSanderhoff Following

Great #impact workshop @smkmuseum yesterday on SMK Open. Today we continue with @Europeanaeu Impact task force #smkopen #openglam



*SMK workshop, Copenhagen, Denmark 2017*

We also learned from them - by working through the initial steps of understanding their impact, they discovered parts of the project that they wanted to put more work into. For example, they felt that SMK Open could be more successful and could have a better chance of achieving impact if they took time to revisit the project's core stakeholders and what the project could do for them.

What else did we learn that could make the playbook an even more effective tool for the heritage sector? We learned that we need to keep things simple at the early stages. Throwing too many tools and concepts into the equation too early can be distracting or confusing, or both. We also learned that reiterating the goals of the workshop, and clearly defining what happens after the workshop really helps to keep everyone focused and engaged.

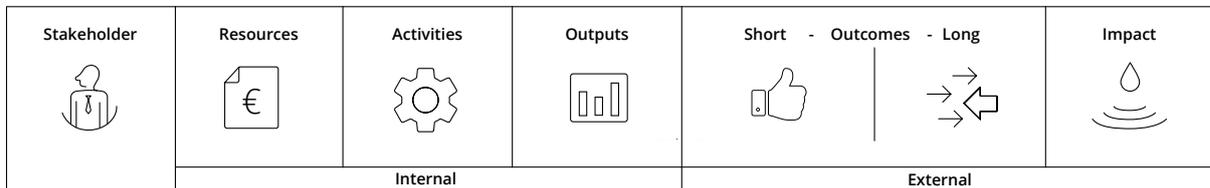
## Designing the 2017 Europeana test impact assessment

After the kick-off meeting, Sinzer took over and we became the students as they walked us through developing the Europeana Change Pathway. In a number of interactive workshops run by Sinzer, we broke down our own markets into stakeholders and then designed the Change Pathway for each market. Our goal was simple: to better understand Europeana's impact on a macro level, and use this as the base for exploring the impact of our three test projects - the Europeana Research, Europeana Fashion, and Europeana Photography thematic collections.

This workshop was a turning point for us - we explored the impact of Europeana in much more detail than we had before, and connected the things that we do with the impact we wanted to have in a much more convincing way. We were immersed in the complexity of our impact yet it didn't feel overwhelming. It felt manageable and it made sense. We were also introduced to the line of accountability - a great tool for distinguishing between the impact you are responsible for delivering and what you cannot be held accountable for.

We learned that we had been on the right track with our earlier approach to running this type of workshop which, combined with the structure Sinzer introduced, gave us confidence to keep moving forward. Despite wanting to keep things simple, we found that introducing the concept of stakeholders was really helpful - breaking them down and taking the time to understand them helped keep conversations focused more on the stakeholder benefits than on organisational achievements, and organising the exercises by stakeholder was a logical step that complemented this.

After the workshop, we worked with Sinzer to document our discussions in a logical manner, without losing the clarity the structured workshop discussions delivered. This resulted in the development of the Pathway Builder. This online spreadsheet captures the elements of the Change Pathway that were developed in the workshop, and provides a way to share that logically with colleagues to gather additional input and perspectives.



*The Change pathway*

Market	Activity	Outputs	Short term outcomes	Long term outcome
Education	We will develop partnerships with policymakers, commercial and non-commercial partners to support engagement in the market	# partnerships developed	Educators feel like they have a better understanding of how to access and use CHI data	Educators are content to rely on Europeana as a trusted source of freely available high-quality cultural heritage data that can be used in their teaching activities.
	We will promote curated datasets that target the market	#curated datasets developed and promoted	Educators feel inspired to use, share and create curated datasets using Europeana Collections data	
	We will engage in funding initiatives	# funding initiatives supported	Increase in number of partnerships developed which increase the connection between education and CHI data	
	We will develop longer term plans for the sector in a sector-specific business plan	publication of education business plan	Increase in participating educators. Educators rate Europeana services 4 or higher on a Likert scale of 1-5	

*The Pathway Builder documents the elements of the Change Pathway*

## Testing the workshop and developing metrics

In the early stages, we had been focusing on the impact of Europeana at a fairly abstract level; the next three workshops we ran broke down the discussions into much more manageable and relatable chunks. Answering questions such as: does accessing heritage material through a Europeana service increase people's knowledge about historic events and different cultures? Do [Europeana Fashion](#), [Europeana Photography](#) or [Europeana Research](#) 'make life easier' for researchers and professionals who use cultural heritage for their work? And is this experience important to them?

We set out to understand if the workshop format for developing a Change Pathway worked as effectively for our partners as it did for us, and what level of preparation was needed to run the workshop. We also wanted to see how the Change Pathway helped the participants develop metrics to collect the data they needed to better understand their impact.

We validated some of our previous experiences - the process of developing the Change Pathway allowed us to see our work from different perspectives, and sometimes in more depth and all participants felt that the workshops had provided a useful set of exercises.

As facilitators, we saw that preparation is a differentiating factor. If you're well-prepared, when discussions fall flat or participants struggle, you can share your own examples and use them to spark conversations. We also learned that developing metrics can be a challenging topic - we had tough discussions comparing the concept of a standard KPI with the identification of data that demonstrates a change has occurred. The Impact Playbook can help in these kinds of situations by including tips and tricks for the facilitator to follow.

But our work did not end here. It laid the foundations for the development of the components of the Impact Toolkit, and enabled us to undertake research so that we better understood our impact.

### Impact survey: How does digital cultural heritage impact you?

We want to know more about how you see things once you've discovered cultural heritage online through one of Europeana's thematic collections or websites (in particular Europeana Fashion, Europeana Photography and Europeana Research).

- We estimate this will take 10-15 minutes to fill in.
- Please complete the survey by Wednesday, 16 August 2017

[Take the survey](#)

*Impact survey in the Europeana Newsletter, July 2017*

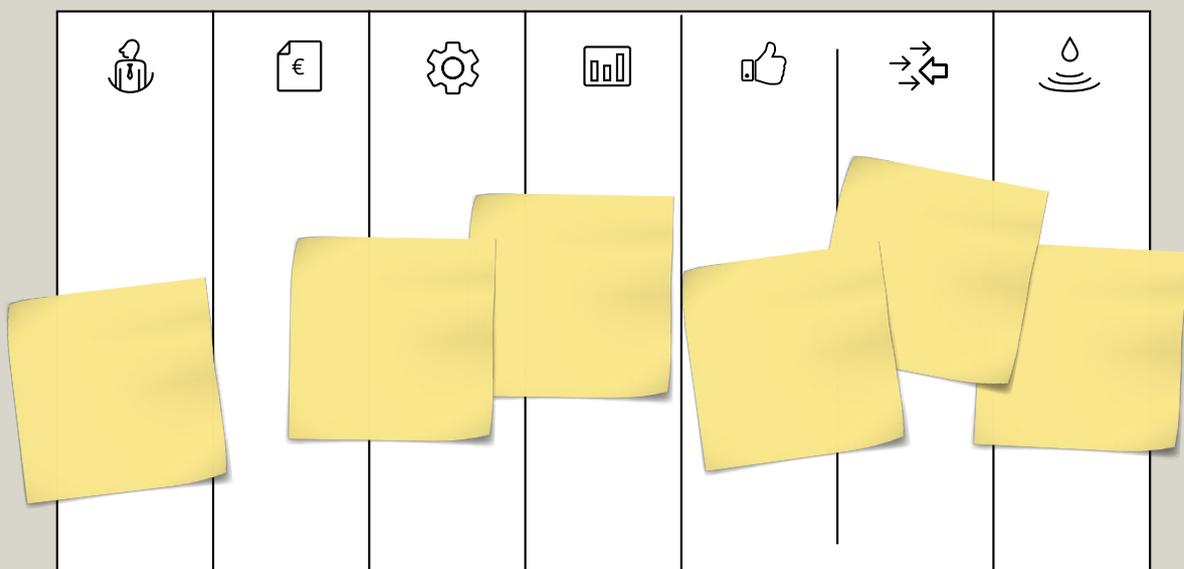
# The foundations of the Impact Toolkit

**Toolkit = Impact Playbook + website full of resources + supportive community**

As we started to better understand our own impact, we talked to our peers about their expectations and looked around at what other sectors were doing in this area. And we realised we had to push our own boundaries. At the start of 2017, we had an ambition to develop a method and common language for talking about impact assessment. This turned into the development of a set of resources to fill a toolkit, using a style that was completely new for Europeana.

## The Impact Playbook: Phase I

As a cultural heritage professional, having a better understanding of your impact should be within your reach. We wanted to make it possible for any professional to make a start exploring the impact of their organisation, activity or project. To do that, we needed to develop a step-by-step guide to hold the hand of anyone undertaking an impact assessment.



*Designing the Change Pathway*

Working together with business process designers Thirty-x, and the Impact Task Force, we launched the beta Impact Playbook in October. Why beta? Because it only covers the first of four phases we believe are vital to embedding impact assessment effectively within an organisation. We also want people to try it out so we can learn from their experiences, and use that to improve what we do.

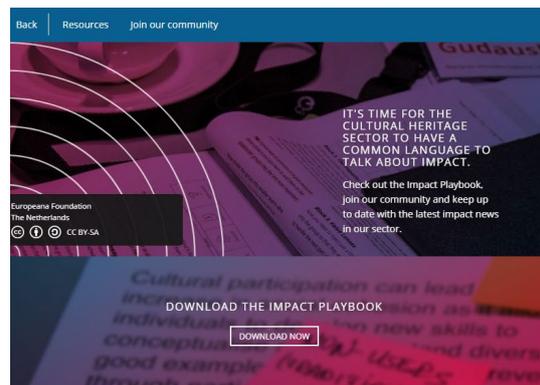
The playbook introduces the topic of impact in the cultural heritage sector, setting a manifesto for change and a methodology to help anyone in the cultural heritage sector better understand their impact. It sounds like a big task, but Phase 1 provides a worked-through method and tools and resources like presentations and workshop canvases that can help anyone do this for themselves.

## A website full of resources

Professionals interested in impact should be able to find the resources they need in one place. A dedicated website should share the components of the toolkit with the community, and provide a trustworthy place for finding out information about undertaking impact assessment within the cultural heritage sector.

From the initial launch in March through to the playbook launch in October, the impact website evolved. It has become the home to the Impact Playbook, the resources it references (e.g. slide decks and canvases), as well as articles about impact, case studies and information about the Impact Task Force. It will be kept up-to-date with news, examples and resources as they become available.

## Take a look at [impkt.tools](http://impkt.tools)



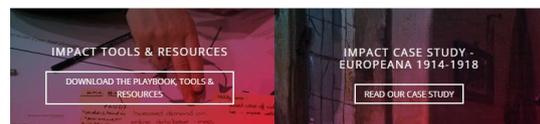
### HOW DO WE KNOW WE ARE MAKING A DIFFERENCE?

Working in the cultural heritage sector is all about working towards making a difference in the people who visit and use our products and services. We believe that we are all better off if we understand how the things we do every day, week and month contribute to bringing about a change in people's lives.

If you are a director or a museum, library or archive, a cultural innovator or someone with an interest in impact in the sector, we want to help you better understand your impact. Our impact playbook helps you to do this.



Working with cultural heritage professionals and experts across the world, we've developed the playbook: a step by step approach to help you identify your impact. On this website you'll find the Impact Playbook and plenty of resources and examples we have developed to help you better understand your impact.



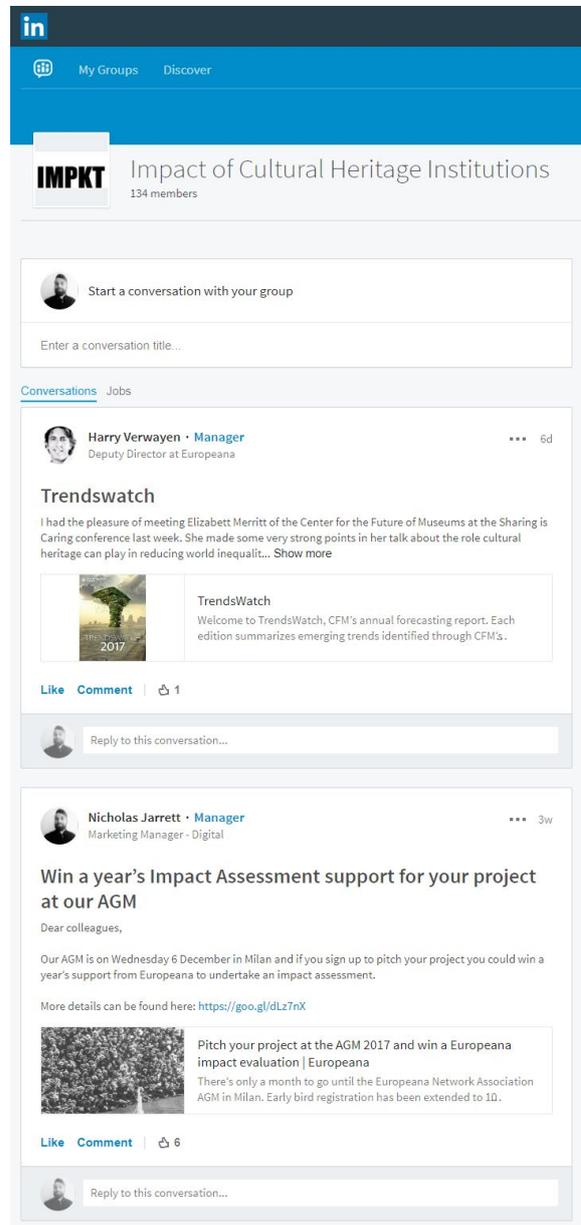
### [Impact on Europeana Pro](#)

## A supportive community

As interest in impact assessment through the cultural heritage sector grows, we want professionals to find a common space to share their interest. From our work in this area, we can bring professionals from across the globe together, to share experiences, knowledge and questions. And we can benefit from their collective experiences by acting as a sounding board, as well as keeping them informed on the latest developments that we know of in the sector.

We started the community as a mailing list who received bi-monthly newsletters providing updates on the progress of developing the impact toolkit. We asked the community what they wanted from a forum before moving it over to a [LinkedIn group](#) which we hope will help generate more opportunity for interaction between members.

**Share your experiences and learn about impact in cultural heritage: Join the [Europeana impact community!](#)**



*Impact community on LinkedIn*

# What's next: lessons learned and next steps

With the beta playbook under our belt, we can now look at the lessons we have learned through the process of developing the toolkit, and at how we can take that forward so that we keep improving our own practices.

## **Take every opportunity to practice as an opportunity to learn**

From our first workshop for Business Plan 2017, in which we laid everything we had out and made little progress, to the last workshop at an Estonian presidency event just days before the launch of the playbook, every step has taught us something valuable. And we've used those lessons to make small, and sometimes large, changes to how we work, making improvements as we go.

*As the playbook, and the language and practice around it develops, we want to maintain this lean approach to development.*

## **Enable every opportunity to learn as an opportunity to develop**

Achieving a better understanding of impact can bring insights and opportunities for organisations to iterate and improve - we've experienced it ourselves and witnessed it in our partners. But we need to develop the practice of impact assessment so that these one-off exercises continue to mature and provide valuable insights to an organisation. We need to move the playbook beyond introducing a basic understanding of impact, and on to addressing the activities of measuring, assessing and narrating impact.

*The phases of the playbook should be developed to enable the practice of impact assessment to become embedded in the organisational business planning cycle.*

## **Empower the impact community to develop their understanding and practice**

We want to continue to nurture the growth of the impact community so that they have a common space to share experiences and best practices, and to ask advice. Including members from across the globe, they can also act as a focus group for new developments, and, through the Impact Task Force, help to steer the development of the playbook.

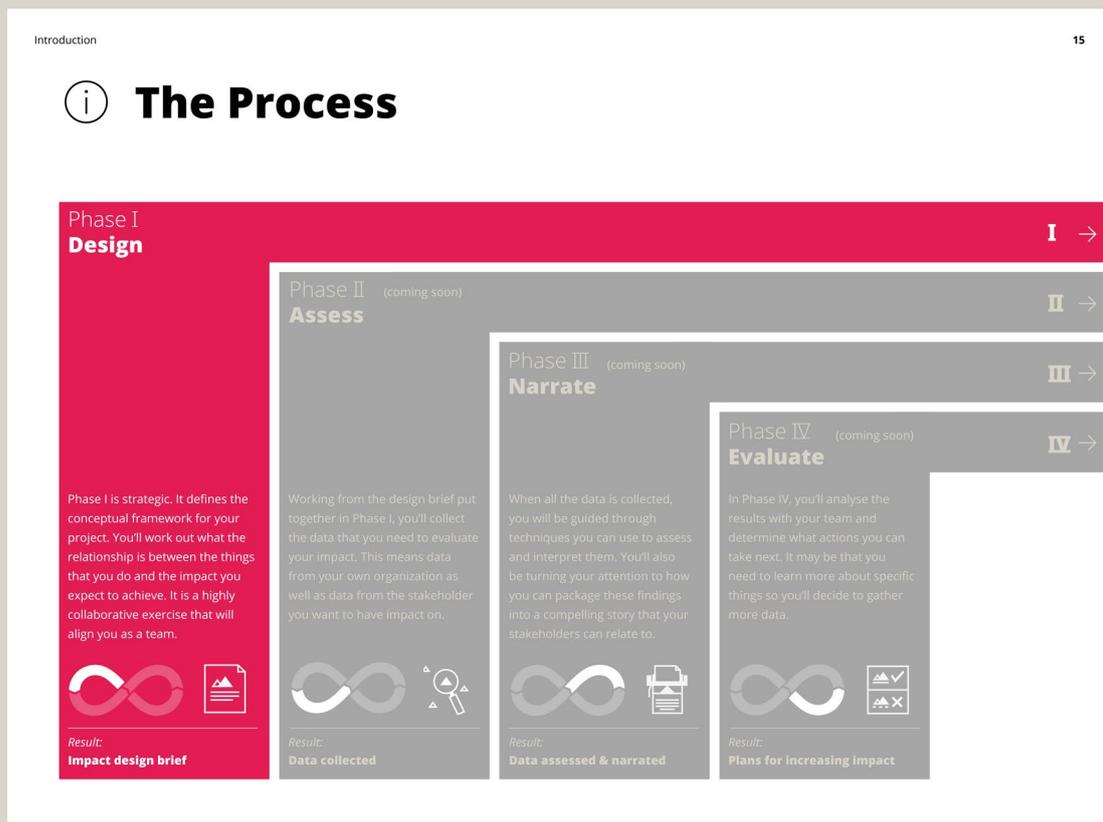
*Nurture the impact community with opportunities to learn and contribute to the developing the subject of impact assessment.*

## **Shoot for the moon, but keep your feet on the ground**

We can't break new ground every time we take a step forward and we shouldn't expect others to either. Impact assessment is a distant goal for many organisations, and the Impact Playbook helps to make that goal achievable. As we look to develop the next phases of the playbook, we want to push our own boundaries so that we can share the latest practices and methods. But we won't do that at the expenses of trusted and achievable techniques.

*Present a variety of established and newly tested methods for measuring, assessing and narrating impact.*

Continuing to work with partners, we'll strive to strike the right balance and we look forward to delivering the next phases of the Impact Playbook next year.



Impact assessment process

**What do you think? Is the toolkit a useful resource for you?  
 Are you keen to explore your impact?  
 Drop us a line at [impact@europeana.eu](mailto:impact@europeana.eu)**