

Self Evaluation Toolkit

This version of the toolkit is for organisations, networks and partnerships who want to evaluate their work as a whole strategically.

Quality and impact

Vision

How strong and inspiring is your organisation's strategic vision?

A shared vision helps people work together towards the same goals.

Is the vision inspiring and up to date? How do you know?

Activities to help improve your evaluation

NHS Scotland

Work to consider your stakeholders using stakeholder mapping.

http://www.isdscotland.org/About-ISD/About-Our-Statistics/_docs/PHI-Guidance-on-Consulting-v0-3-20151203.pdf

University of Warwick

Work to consider your stakeholders using stakeholder mapping.

https://www2.warwick.ac.uk/services/ldc/leadership/change/toolkit_4_stakeholder_mapping.doc

CIPD

Work to consider the context using PEST (Political, Economic, Sociological, Technical, Legal and Environmental analysis).

<https://www.cipd.co.uk/knowledge/strategy/organisational-development/pestle-analysis-factsheet>

Open University

Work creatively on a 'rich picture' vision.

<http://systems.open.ac.uk/materials/T552/pages/rich/richAppendix.html>

Better Evaluation, Australia

Work creatively on a 'rich picture' vision.

www.betterevaluation.org/en/evaluation-options/richpictures

NCVO

Think about campaigning and communications in developing a vision.

<https://knowhownonprofit.org/campaigns>

Quality and impact

Impact

How confident is your organisation that its work has an impact?

Your organisation needs to show that its work:

- Makes a difference to its audiences, participants or local economy.
 - Does not negatively impact the environment. Better still, its work has a civic role in promoting
- better care of the environment.
 - Does not exclude people - even better, its work promotes diversity, for example ethnicity, faith, age,
- socio-economic groups, disability, sexual orientation and gender.

To do this everyone in your organisation must keep in mind cultural, artistic, social, economic, environmental and equality impacts.

Activities to help improve your evaluation

NCVO

Work on an overview of your impact.

<https://knowhownonprofit.org/organisation>

NPC

Work to plan for impact and then review using a Theory of Change.

<http://www.thinknpc.org/our-work/our-services/theory-of-change/>

Happy Museum

Work to plan impact in a more creative and flexible style using a Story of Change.

<http://happymuseumproject.org/story-of-change/>

MLA

Use cultural sector expertise on Generic Learning and Social Outcomes

<http://www.artscouncil.org.uk/measuring-outcomes/generic-learning-outcomes#section-1>

Make Culture Work

Work to develop evaluation practice by sharing with others.

<http://www.makingculturework.org.uk/>

NPC

<http://inspiringimpact.org/measuringup/>

Culture Case

Use cultural research for general evidence of impact.

www.culturecase.org

Happy Museum

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<http://happymuseumproject.org/resources/tools/>

Social Value UK

<http://www.socialvalueuk.org/>

NEF, Charities Evaluation Service.

<http://www.proveandimprove.org/>

Arts Enterprise with a Social Purpose (Aesop)

<http://www.ae-sop.org/>

Quality and impact

Quality

How confident is your organisation about the quality of its creative or cultural work?

Work should be of the best quality possible to meet diverse stakeholders' needs.

Think about the quality of the process and finished product for all your stakeholders.

Activities to help improve your evaluation

ACE

Work systematically on quality across the organisation using a quality framework.

<http://www.artscouncil.org.uk/quality-metrics/quality-metrics>

ACE

Work systematically on quality for young people using Quality Principles.

<http://www.artscouncil.org.uk/cultural-education-challenge/cultural-education-challenge-resources#section-4>

Quality and impact

Repeat audiences

How well does your organisation serve its regular audiences, visitors, customers, participants or community?

Regular audiences are essential for support and a reliable income stream. In a participatory project or supportive service, audiences must have the opportunity to progress.

Consider how well your organisation serves repeat audiences, whatever their level of interest.

Activities to help improve your evaluation

DCMS, ACE, Historic England, Sport England

Use cultural sector data to inform audience decisions.

<http://www.artscouncil.org.uk/taking-part-survey>

Audience Agency

Use cultural sector market segmentation to inform audience decisions.

<https://www.theaudienceagency.org/>

Arts Marketing Association

Sign up to cultural sector marketing expertise.

<http://www.a-m-a.co.uk/>

Arts Marketing Association

Use cultural sector case studies for shared practice.

<http://www.culturehive.co.uk/>

Office for National Statistics

Use national, regional or local data to inform audience decisions.

<https://www.ons.gov.uk/>

Public Health England

Use national, regional or local data to inform audience decisions.

<http://fingertips.phe.org.uk/profile/health-profiles>

Quality and impact

New audiences

How well does your organisation reach and include new audiences, visitors, customers, participants or communities?

New audiences are essential for future income and artistic development.

Consider how well your organisation reaches new audiences and whether they fall within your targeted demographic groups.

Activities to help improve your evaluation

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Work to consider your stakeholders using stakeholder mapping.

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Office for National Statistics

<https://www.ons.gov.uk/>

Public Health England

Use national, regional or local data to inform audience decisions.

<http://fingertips.phe.org.uk/profile/health-profiles>

CIPD (Ansoff)

Use risk management expertise whilst deciding how to develop new audiences.

<http://www.conceptdraw.com/examples/marketing-matrix-and-schedules>

People development

The team

Does your organisation have the right people to deliver its vision and reach regular or new audiences authentically?

Making sure that teams and the broader workforce have the skills and experience they need is essential for quality and impact, and must be regularly reviewed. Teams also need to reflect existing and new audiences and communities, and include a range of learning styles to meet different needs. To achieve this, recruitment at all levels, from board to volunteers, should use best equality and diversity practice.

Think about the skillset, experience, diversity and styles of different team members, from the board to volunteers.

Activities to help improve your evaluation

NCVO

Audit the skills in your team.

<https://knowhownonprofit.org/people/staff/managing-performance-learning-and-skills-development/development>

Office for National Statistics

Use data from the Office of National Statistics to understand your local population.

<https://www.ons.gov.uk/>

NCVO

Use established expertise for recruiting and managing staff and volunteers.

<https://knowhownonprofit.org/people>

People development

Roles and performance

Does everyone in your organisation know their role, their relationship to others and how well they are performing?

Clarity about the company structure will need updating regularly, especially as collaboration becomes more normal. Good team working and clarity on individual roles makes an enormous difference to how well we function and how competitive we are in attracting a workforce.

Consider board members, managers, practitioners, freelancers and volunteers and make sure authentic in-depth partnerships are understood.

Activities to help improve your evaluation

NCVO

Audit the skills in your team.

<https://knowhownonprofit.org/people/staff/managing-performance-learning-and-skills-development/development>

CIPD

Use established expertise for making sure good people management leads to excellence.

<https://www.nsai.ie/NSAI/files/7f/7f6730e9-d0df-4231-ab1e-76b6aa26e035.pdf>

NCVO

Use established expertise on leadership and managing change.

<https://knowhownonprofit.org/leadership>

Belbin

Work with the team to understand different team working styles and strengths.

<http://www.belbin.com/>

Myers Briggs

Work with the team to understand different team working styles and strengths.

<http://www.myersbriggs.org/>

<https://www.the-sse.org/>

ACEVO

Sign up to leadership support.

<https://www.acevo.org.uk/>

People development

Wellbeing and job satisfaction

Do the people in your organisation enjoy their work and find it satisfying?

Whether people enjoy their work is one of the greatest indicators of success in a sector which depends on its workforce.

Think about job satisfaction in your organisation and how happy and satisfied people are.

Activities to help improve your evaluation

Happy Museum

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<http://happymuseumproject.org/resources/tools/>

Wellbeing at work (CIPD)

<https://www2.cipd.co.uk/NR/rdonlyres/DCCE94D7-781A-485A-A702-6DAAB5EA7B27/0/whthapwbwrk.pdf>

NICE guidance

<https://www.nice.org.uk/guidance/ph22>

People development

Partnerships

Does your organisation have the right partnerships to best deliver its vision

Collaboration with partners will be a feature of the future funding landscape - it's also good for staff and audiences.

Think about the strength of partnerships, including depth and breadth, and their ability to improve diversity, capability or capacity.

Activities to help improve your evaluation

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Work to consider your stakeholders using stakeholder mapping.

http://www.isdscotland.org/About-ISD/About-Our-Statistics/_docs/PHI-Guidance-on-Consulting-v0-3-20151203.pdf

University of Warwick

Work to consider your stakeholders using stakeholder mapping.

https://www2.warwick.ac.uk/services/ldc/leadership/change/toolkit_4_stakeholder_mapping.doc

Big Lottery

Use expertise on working in partnership generally.

http://www.biglotteryfund.org.uk/pub_good_practice_guide.pdf

NCCPE

Use expertise on working in partnership with HE.

<https://www.publicengagement.ac.uk/do-it/working-partnership>

Process development

Planning and monitoring

Does your organisation have the plans it needs for cultural or artistic, social, financial and environmental sustainability?

While the arts and culture sectors must be responsive and seize opportunities, reliable planning and delivery provide the secure base from which to launch innovation.

Think about plans for cultural/artistic, social, financial and environmental areas. Are they up to date and effectively reported against?

Activities to help improve your evaluation

Tutorials Point

Use expertise from many years of project management experience.

http://www.tutorialspoint.com/management_concepts/project_management_triangle.htm

NVCO

Use expertise on non-profit project management.

<https://knowhownonprofit.org/people/your-development/professional/projectman>

Process development

Information management

How well does your organisation collect, catalogue, store, retrieve and share information?

Effective information collection, storage and management can really inform the way organisations work and can help them run smoothly. Sharing information with partners and stakeholders can also improve the way organisations interact with others.

- Does information management support efficient, ethical and effective working practice?
- Has information management helped your organisation in its local context?

Activities to help improve your evaluation

NPC

Use a self assessment approach to planning your use of evidence.

<http://inspiringimpact.org/measuringup/>

Arts Professional

Use a box office system that meets your needs. There are many on the market and this comparison may help.

<http://www.artsprofessional.co.uk/taxonomy/term/699/all>

Collections Trust

Use expert guidance on collections management.

<http://collectionstrust.org.uk/product/collections-management-a-practical-guide/>

HM Govt.

Use data protection legislation to ensure information is safe.

<https://www.gov.uk/data-protection/the-data-protection-act>

Online Sharing: Dropbox

<https://www.dropbox.com/home>

Communications: Mailchimp

<https://mailchimp.com/>

Online Sharing: Box

Communications: Survey Monkey

<https://www.surveymonkey.co.uk/>

Database: Artifax

<http://www.artifax.net/>

Database: CivicCRM

<https://civicrm.org>

Database: Lamplight

<http://www.lamplightdb.co.uk>

Online Conferencing: Skype

<https://www.skype.com>

Online Conferencing: Google Hangout

<https://hangouts.google.com/>

Process development

Communications

How well do does your organisation communicate its messages, both externally and internally?

A communication plan should start with the target market and the market's needs, but also be clear on the key message and how the organisation can evidence it persuasively. Internally the organisation must be clear about 'who needs to know' so that it operates effectively and involves the right people.

Think about both external and internal needs, and the use of digital channels.

Activities to help improve your evaluation

NCVO

Work on a broad communications strategy using non-profit expertise.

<https://knowhownonprofit.org/campaigns/communications/communications-strategy>

IPA

Work on campaigning communications specifically.

<http://www.ipa.co.uk/Document/communication-strategy-best-practice-guide>

Government Communication Service

Work on internal communications specifically.

<https://communication.cabinetoffice.gov.uk/ic-space/strategy-and-internal-communications/developing-an-internal-communications-strategy/>

Process development

Resources and facilities

Do you use your physical and other assets creatively, sustainably and to achieve value for money?

Physical assets like venues and collections are central to the audience experience, but they are costly to look after and some see them as exclusive. Protecting intangible assets like brand and intellectual property is an ongoing task, and cultural and environmental resources are even harder to maintain.

Consider different types of assets in making sure you achieve the best value for money and the most creative results. Think about safeguarding assets for the future, including protecting the organisation's intellectual property (if relevant) and brand.

Consider extending these approaches to suppliers.

Activities to help improve your evaluation

Julie's Bicycle

Work to ensure the sustainability of your venue and approach.

<http://www.juliesbicycle.com/services>

BREEAM

Use a recognised model of sustainable practice for building.

<http://www.breeam.com/>

Intellectual Property Office

Use guidance on your intellectual property approach.

<https://www.gov.uk/government/organisations/intellectual-property-office>

Ethical Property Foundation

Use guidance from experts in managing property for charities.

<http://www.ethicalproperty.org.uk/content.aspx?CategoryID=246>

Process development

Financial management

How strategic and effective is your organisation's financial planning, monitoring and reporting?

Financial management, like planning and general strategy, has a role at every stage of your organisation's work; for example, allocating funds properly using the full cost recovery method is essential to show the true cost of services, while monitoring how things are going and reporting on surplus/loss are basic to organisational sustainability.

Financial management should be strategically linked to cultural and artistic work. More sophisticated financial management should also account for social and environmental assets and impact.

Think about all these elements regularly; before, during and after spending.

Activities to help improve your evaluation

Big Lottery.

Use guidance on Full Cost Recovery for managing finances as well as fundraising.

<https://www.biglotteryfund.org.uk/funding/funding-guidance/applying-for-funding/full-cost-recovery>

Association of Chartered Certified Accountants.

Use the Cost Volume Profit analysis approach to manage a portfolio of projects.

<http://www.accaglobal.com/uk/en/student/exam-support-resources/fundamentals-exams-study-resources/f5/technical-articles/CVP-analysis.html>

Chartered Institute of Public Finance & Accounting.

Sign up to CIPFA newsletters for regular updates on the public finance.

<https://www.cipfa.org/>

NCVO

Use guidance on non-profit financial management.

<https://knowhownonprofit.org/organisation/operations/financial-management>

Process development

Technical systems

Do your organisation's technical systems allow its work to run smoothly, keep things safe and respond to the modern world?

Good processes make a huge difference to an organisation's productivity, from speeding up administration to capturing learning for sharing.

Think about whether your organisation's processes and systems are efficient, up to date and enabling, both with audiences and behind the scenes with its people and assets.

Activities to help improve your evaluation

Sign up to membership organisations especially for technical staff, so they can stay up to date with new developments.

AmbITION

Work on an overview of your digital transformation.

<http://www.getambition.com>

Online Collaboration: Google

<https://www.google.co.uk/docs/about/>

Online Sharing: Box

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<https://www.box.com/home>

Online Sharing: Dropbox

<https://www.dropbox.com/home>

Meeting management: Doodle Poll

http://doodle.com/en_GB/

Project Management: Teamwork

<https://www.teamwork.com/>

Communications: Mailchimp

<https://mailchimp.com/>

Communications: Survey Monkey

Project Management: Basecamp

<https://basecamp.com/>

Project Management: SmartSheet

<https://www.smartsheet.com/>

Database: Artifax

<http://www.artifax.net/>

Database: CivicCRM

<https://civicrm.org>

Database: Lamplight

<http://www.lamplightdb.co.uk>

Database: Tessitura

http://welcome.tessituranetwork.com/?gclid=Cj0KEQjwiI3HBRDv0q_qhqXZ-N4BEiQAOTiCHgNrms6zFcazGaRIB3A6wKH_mVv6C9nm5UPw9S1gLBYaArNS8P8HAQ

Online Conferencing: Skype

<https://www.skype.com>

Online Conferencing: Google Hangout

<https://hangouts.google.com/>

Process development

Legislation

How up to date is your organisation's understanding of the legislation that affects it?

Legislation is a huge and varied issue for organisations, ranging from equality and diversity to child protection, financial management and environmental obligations.

Think about who is responsible for what in your organisation and whether policies are applied and up to date.

Activities to help improve your evaluation

Charity Commission

Use free resources from the Charity Commission.

<https://www.gov.uk/government/organisations/charity-commission>

NCVO

Use free resources from NCVO.

<https://www.ncvo.org.uk/policy-and-research/charity-law-and-regulation>

HM Govt

Use free resources from the Department for Business, Energy & Industrial Strateg.

<https://www.gov.uk/government/organisations/department-for-business-energy-and-industrial-strategy>

Legal Advice Centre

Use free resources from the Legal Advice Centre

<http://www.legal-advice-centre.co.uk/>

LASA

Use free resources from LASA

<http://lasa.org.uk/>

Copyright User

Use free resources from Copyright User

<http://copyrightuser.org>

LMSC

<http://www.lmsconline.org/>

FSB

Sign up to the Federation of Small Businesses.

<http://www.fsb.org.uk/>

Business development

Internal alignment

How aligned and consistent is your organisation internally?

Over years policies and practice tend to multiply and diverge. Planning on a yearly basis so that everything is driving in the same direction makes us organisations more efficient and effective.

Consider how well these things link: the needs of repeat or new audiences, the needs of partners, the vision, mission and governance, intended outcomes, 'stewardship' obligations, people development and artistic, learning, business and other plans.

Activities to help improve your evaluation

NPC

Work to plan and review using a Theory of Change.

<http://www.thinknpc.org/our-work/our-services/theory-of-change/>

Happy Museum

Work to plan impact in a more creative and flexible style using a Story of Change.

<http://happymuseumproject.org/story-of-change/>

Association of Independent Museums

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<http://www.aim-museums.co.uk/>

NCVO

<https://www.ncvo.org.uk/practical-support/quality-and-standards/pqasso>

Inspiring Learning for All

<http://www.artscouncil.org.uk/advice-and-guidance/inspiring-learning-all-home-page>

Cabinet Office

<http://vcsestrengthchecker.org.uk/>

British Library

<http://www.bl.uk/business-and-ip-centre>

Social Enterprise UK

<https://www.socialenterprise.org.uk/>

Work in a large organisation towards international standards.

https://www.iso.org/files/live/sites/isoorg/files/archive/pdf/en/iso_9000_selection_and_use-2009.pdf

Mindtools

Use systematic approaches to decision making.

https://www.mindtools.com/pages/main/newMN_TED.htm

Business development

National context

How up to date is your organisation's knowledge about its wider context?

Awareness of what is happening in the wider world is as important as knowing what's happening locally. Different work areas will find different contexts relevant, whether it's local, regional, national or international.

Think about business development within political, funding, cultural, social economic and environmental contexts.

Activities to help improve your evaluation

CIPD

Work to consider the context using PEST (Political, Economic, Sociological, Technical, Legal and Environmental analysis).

<https://www.cipd.co.uk/knowledge/strategy/organisational-development/pestle-analysis-factsheet>

Wikipedia

Sign up to think tanks and institutes that are relevant to you.

https://en.wikipedia.org/wiki/List_of_think_tanks_in_the_United_Kingdom

Business development

Local context

How well does your organisation understand its local, place-based role and our 'markets'?

Knowledge of the locality and how an organisation fits into it are central to planning, fundraising and attracting an audience. Children, young people and those who are socially disadvantaged are especially important, as are other groups, like older people.

Consider whether local audiences, partners and stakeholders feel inspired and involved. Does the organisation increase the diversity of access and the targeting of specific groups?

Activities to help improve your evaluation

Office for National Statistics

Use data from the Office of National Statistics to understand your locality.

<https://www.ons.gov.uk/>

ACE

Use Arts Council England cultural education data.

<http://www.artscouncil.org.uk/research-and-data/children-and-young-people>

Use data from local partnerships and forums, like Health and Wellbeing Boards, Local Enterprise Partnerships (LEP), Chambers of Commerce and local Councils for Voluntary Service (CVS).

Business development

Research & evaluation

How well does your organisation reflect, evaluate, research and innovate?

Research and evaluation take many forms and are essential for improvement. However, without intentional planning, the organisation risks evaluation getting sidelined.

How well does evaluation assess your organisation's cultural and artistic, social, financial and environmental performance? How well does evaluation communicate with diverse stakeholders to get their genuine views?

How well does learning flow through working practice for ongoing improvement?

Activities to help improve your evaluation

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<http://www.ae-sop.org/>

Social Value UK

<http://www.socialvalueuk.org/>

NEF, Charities Evaluation Service.

<http://www.proveandimprove.org/>

Business development

Income generation

How effectively does your organisation generate income?

Organisations can maximise income in many ways, all of which need robust skills to deliver. Think about the range of skills required, from earning income to working profitably with partners to providing persuasive evidence to funders and commissioners.

Activities to help improve your evaluation

NCVO

Use national income generation guidance.

<https://knowhownonprofit.org/funding>

Arts Fundraising

Use national funding-raising guidance.

<http://artsfundraising.org.uk/>

Artswork, ROH Bridge, KentCC

Use commissioning guidance for the cultural sector.

<http://www.artscommissioningtoolkit.com/>

Beehive

Use a funder finder.

<https://www.beehivegiving.org/>

Business development

Risk

How well does your organisation plan its work so that it has a balance of risky and safe work?

A mixed delivery model spreads risk and holds more interest for workforce and audiences alike. Consider a diverse portfolio of work including risky and safe projects.

Consider a diverse portfolio of work including risky and safe projects. Consider managing a range of entrepreneurial and reliable ventures and a range of delivery relationships and structures.

Activities to help improve your evaluation

Tutorials Point.

Work through established risk management processes with your team.

http://www.tutorialspoint.com/management_concepts/project_risk_management.htm

IRM

Sign up to the Institute of Risk Management.

<https://www.theirm.org/>

Business development

Future plans

How good is your organisation at 'horizon scanning' and assessing trends in its performance?

Organisations need to look both inwards and outwards to plan for what is a very changeable future in terms of creativity, politics, economics, society, technology, the law and the environment. Think about your organisation's performance over time as well as the bigger external picture.

Activities to help improve your evaluation

Local Enterprise Partnership network

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<https://www.lepnetwork.net/>

Local Authorities

none

NCVO

Work with your team to agree a business plan, however short.

<https://knowhownonprofit.org/tools-resources/business-plan-template>

CultureCase

Sign up to cultural data and research.

<http://www.culturecase.org/>

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<https://www.cipd.co.uk/knowledge/strategy/organisational-development/pestle-analysis-factsheet>

TED Talks

Get inspired!

<https://www.ted.com/>