



## **Research Insights** Designing a cooperative digital future for managing the arts



**Impact Practices** *Quantitative and qualitative assessment frameworks An initial overview* 

Jessa Agilo, Series Editor Kelly Hill Alix MacLean



ArtsPond / Étang d'Arts 225-38 Abell Street Toronto, ON M6J 0A2 https://artspond.com hello@artspond.com

© 2020 ArtsPond / Étang d'Arts. Licensed under a Creative Commons Attribution 4.0 International License, CC BY 4.0.

Preview edition (September 12, 2020)

#### CITATION

Agilo, J (Series Ed.), Hill, K & MacLean, A. Quantitative and qualitative assessment frameworks: An initial overview for Hatch Open + Artse United. In *Research Insights: Designing a cooperative digital future for managing the arts* (Part 2: Impact Practices). Preview edition. Toronto: ArtsPond / Étang d'Arts, 2020. https://artspond.com/actions/research-insights

#### SERIES CONTRIBUTORS, FUNDERS, PARTNERS



#### Preface

*Research Insights: Designing a cooperative digital future for managing the arts* is a series of reports summarizing insights from collaborative research facilitated by ArtsPond to help foster a prosperous, shared digital future for managing the arts.

The mandate of ArtsPond is to nurture healthy human ecosystems that promote social, spatial, economic, digital, and equity justice by fostering cooperative actions fusing the values and practices of social innovation and the arts.

In Summer 2019, ArtsPond received multi-phase funding from the Transformation of Organizational Models component of Canada Council for the Arts' Digital Strategy Fund to incubate the development of **Hatch Open** (an open source arts management cloud computing solution) and **Artse United** (an arts management platform cooperative, powered by Hatch Open).

The goals of these two interconnected platforms are to boost economic and digital justice and strengthen creative and entrepreneurial excellence of small creators and producers in arts and culture.

*Research Insights: Designing a cooperative digital future for managing the arts* provides a summary of key findings from early-stage human-centered design research, prototyping, and other activities prioritizing the visual, performing, and disability arts from Summer 2019 to Spring 2021.

Reports in this series include:

#### Design Thinking (Part 1, Fall 2020)

Prepared by **Jessa Agilo** (ArtsPond) and **Margaret Lam** (BeMused Network), Part 1 summarizes the research protocols and insights from preliminary design thinking activities for Hatch Open + Artse United including human-centered design workshops in Toronto, Sudbury, and Ottawa in Ontario, Canada In Summer/Fall 2019.

#### Impact Practices (Part 2, Fall 2020)

Prepared by **Kelly Hill**, **Alix MacLean** (Hill Strategies Research) and **Jessa Agilo** (ArtsPond), Part 2 presents a review of quantitative and qualitative assessment frameworks from within and outside the arts in Canada, Australia, United States, and United Kingdom. These frameworks help inform the design of Hatch Open + Artse United's early-stage impact practice solutions.

#### Legal Practices (Part 3, Fall 2020)

Prepared by **Andreas Kalogiannides** (Aura LLP), Part 3 presents recommendations for legal practices on which Hatch Open + Artse United will need to focus during its early stages, such as user privacy, data management, and intellectual property issues and agreements.

#### Platform Coops (Part 4, Winter 2021)

Prepared by **Stephanie Guico** (Coop Coach) and **Jessa Agilo** (ArtsPond), Part 4 shares input from preliminary structural scoping research on the values, interest, and steps for establishing and sustaining Artse United as a viable platform cooperative for managing the arts.

#### Prototyping (Part 5, Spring 2021)

Prepared by **Jessa Agilo** (ArtsPond) and **Amine El** (Technical Lead), Part 5 provides an overview of technical and strategic insights leading to launch of Hatch Open's early stage financial and project management, business intelligence and impact investing technologies.







## **Acknowledgements**

Thanks to the talented team that has guided the development of Hatch Open + Artse United, including:

| Founder, Executive Producer<br>Technical Lead | <b>Jessa Agilo</b> (ArtsPond)<br><b>Amine El</b> (Octagram)                      |
|-----------------------------------------------|----------------------------------------------------------------------------------|
| Design Thinking Lead                          | Margaret Lam (BeMused Network)                                                   |
| Design Thinking Associate                     | Alana Boltwood (Metimea)                                                         |
| Coop Coach                                    | Stephanie Guico                                                                  |
| Evaluation Coach                              | Kelly Hill (Hill Strategies Research)                                            |
| Evaluation Associate                          | Alix MacLean (Hill Strategies Research)                                          |
| Legal Coach                                   | Andreas Kalogiannides (Aura LLP)                                                 |
| Finance Coach                                 | Jenna Winter                                                                     |
|                                               |                                                                                  |
| Resident Artists                              | Talysha Bujold-Abu, Agneya Chikte, Chris Dodd,<br>Kataring Follon, Oligia Chartt |
|                                               | Katerina Fuller, Olivia Shortt                                                   |
| Associates                                    | Jeanne LeSage (Jeanne LeSage Arts Management)                                    |
|                                               | Sara Meurling (Culturethink)                                                     |
| Producers                                     | Michael Pereira                                                                  |
|                                               | Megan Wilk                                                                       |
|                                               | Heather Wood                                                                     |
| Interns                                       | Kendra Miller, Aylin Akyol,                                                      |
|                                               | Sheriza Anne De Guzman, Katrina MacKew,                                          |
|                                               | Rachel Vrecic, Natasha Iqbal                                                     |
| Translators (English to French)               | Alma Boukhaled                                                                   |
|                                               | Francesco Spagnolo                                                               |
|                                               | Ayesha Veerasuntharam                                                            |
| Interpreter (ASL)                             | Carmelle Cachero                                                                 |
| Typist                                        | Ryan Sero                                                                        |
| Design                                        | Agilo Arts                                                                       |
| 'Eocus IT' Particinants                       | -                                                                                |

#### 'Focus IT' Participants

Anonymous, Sue Balint, David Bobier, Adam Cohoon, Emily Gillespie, Caitie Graham, Cam Luu, Culture Days, Maxine Heppner / Across Oceans, Erin Jones, Sean Lee, Phyllis Lewis, Kayla McGee, Bridget MacIntosh, Kristina McMullin, Oscar Moreno, Jerry Pergolesi, Heidi Persaud, Luke Reece, Cyn Rozeboom, Réjean Tremblay, Aitak Sorahitalab, Eileen Eryn Rene Vogn, Lisa Anita Wagner, Ashley Watson

#### 'Focus ON' Participants

Anonymous

Special thanks to Lindsay Fisher and Emily Servais (Creative Users Projects), Andrew Scholotiuk and Cam McRes (FAVA / AMS Network), Diane Davy and Kehinde Bah (WorkInCulture), Peter Cameron and Erin Morgan (Ontario Coop Association), Colin Clark and Jutta Treviranus (Inclusive Design Research Centre @ OCAD University), Christina Loewen (Opera.ca), Kris Erickson, Humber College Institute of Technology & Advanced Learning, and Ryerson University. Additional thanks to Stocksy United, Mass Culture, Ontario Association of Art Galleries, Tangled Arts + Disability, ArtsPond's staff Parul Pandya, Margaret Lam, Jean Macpherson, Lynn Briand, Cynthia Lickers-Sage, Jai Djwa, Inga Petri, Cate Proctor, Perry Voulgaris (DigitalASO), and Rob Boyd, Jose Gutierrez, Kate Hollett, Daniel Kligerman, Arthur Yeung (ArtsPond board of directors).

## Land Acknowledgement

ArtsPond is rooted in Toronto, the traditional territories of the Huron-Wendat, the Anishnabek Nation, the Haudenosaunee Confederacy, and the Mississaugas of the Credit First Nation.

Tkaronto (Mohawk word meaning "the place in the water where the trees are standing") is home to many First Nations, Métis, Inuit, and Afro-Indigenous people from across Turtle Island.

With regards to reconciliation with Indigenous peoples, it is vital to acknowledge the necessity for non-Indigenous people to recognize and uphold Indigenous sovereignty and Land Back.

The arts and culture sector has an important role to play in reconciliation and decolonization in so-called Canada through engagement, practices, compensation, and programs. It will be crucial for non-Indigenous people to avoid the tokenization of Indigenous arts and culture. Instead, the arts and culture industry must prioritize meaningful relationship-building with Indigenous artists, and to respond to the historical, local, and systemic realities and struggles with the impact of settler colonialism on our cities and communities.

We must continuously reflect on our role to play as settlers on Indigenous land. It is essential to consider how we foster and take care of the land, how we live together, and to help those who are underrepresented and underprivileged due to settler colonialism, capitalism, and white supremacy.

## Equity, Access, and Inclusion

In Canada, there are systems of power that grant privilege and access unequally such that inequity and injustice result, and that must be continuously addressed and changed. Cultural equity is critical to the long-term viability of the arts sector to thrive.

At ArtsPond, we believe we must all hold ourselves accountable through acknowledging and challenging our inequities and work with our community partners to make collective change. Everyone deserves equal access to a full, vibrant creative life, which is essential to a healthy and vibrant society. Through social, cultural, economic, physical, and digital spaces and platforms, artists can challenge inequities and encourage, imagine, and realize positive alternatives.

ArtsPond, Artse United + Hatch Open aim to embody equity in our values, policies, and practices to ensure all people are represented; including, yet not limited to, those who have been historically underrepresented based on age, ancestry, colour, ethnic origin, race, citizenship, creed (religion), disability, sexual orientation, gender, gender identity, and socioeconomic status.

We value and prioritize the voices of Indigenous, 2SLGBTQ+, Black, Brown, and other racialized people, people with disabilities, youth, elders, women, New Canadians, official language minorities, rural-remote communities, and other equity-seeking groups. We do so with the intention of developing more equitable arts policy, to better empower underserved artists and cultural workers, and to nurture more accessible spaces and the fair distribution of social, physical, economic, cultural, digital, and informational resources.

## Contents

| Preface                                      | 3  |
|----------------------------------------------|----|
| Acknowledgements                             | 4  |
| Scope                                        | 7  |
| Key findings                                 | 7  |
| Main questions and themes                    | 7  |
| Initial community input regarding evaluation | 8  |
| Arts-specific assessment frameworks          |    |
| Other useful arts resources and guides       | 19 |
| Non-arts frameworks and guides               | 19 |
| Other useful non-arts resources              | 20 |
| Future considerations                        | 23 |
| Profile                                      | 25 |

## Scope

## Quantitative and qualitative assessment frameworks: An initial overview for Hatch Open + Artse United

#### Prepared by Kelly Hill + Alix MacLean (Hill Strategies Research), and Jessa Agilo (ArtsPond)

For this review, the authors sought to answer three related questions:

- What stories, impacts, information, data, or content do small creators and producers currently use to capture and assess the challenges, successes, and impacts of their arts and culture careers?
- What assessment frameworks from within or outside the arts might guide the design of Hatch Open + Artse United's early-stage impact practice and impact investing solutions?
- What assessment frameworks or approaches to evaluation may help prioritize the worldviews of equity-seeking groups in arts and culture (i.e., Indigenous, Black, 2SLGBTQ+, Crip/Mad Arts, etc.)?

## Key findings

- Best practices for impact assessment and evaluation are typically not well understood by small creators and producers in arts and culture
- No single, existing framework will be a perfect fit for Hatch Open + Artse United
- Many frameworks have some promising and some problematic aspects
- Critiques of existing frameworks provide useful leads in thinking about a framework that is equityfocused, inclusive, and useful to many communities within the larger arts community
- Evaluation frameworks from community-engaged arts offer relevant insights
- Frameworks from beyond the arts will also help guide this thinking (i.e., social innovation and social impact measurement)

## Main questions and themes

- An important theme in consultations for Hatch Open + Artse United and Canada Council's qualitative impact measurement project is that impact is often misunderstood, and artists and organizations need help "to conceptualize and articulate their impact"
- Hatch Open + Artse United consultations revealed that artists want to access an array of public and private data to help illustrate their impact and promote learning and insight, including data related to administration and programming, finance, marketing, fundraising, equity and more
- As noted in an Australian framework process, "There is no magic bullet for 'demonstrating' the value of culture." Culture is linked to "all kinds of value: economic, health, social cohesion, public, longitudinal, institutional, intrinsic, instrumental, personal, transformative, livability. Anything and everything: just like culture itself."
- Storytelling is important, with desire to "visualize data/statistics in creative ways to display a story"
- There is a need to incorporate different ways of knowing from different cultures and think carefully about ideas such as rigour, objectivity, quality, and neutrality
- There are key questions of "Who is an expert?", "Who is a peer?", and "Who is evaluation for?" in different communities
- Cooperative, collective, and/or community ownership and oversight is critical to strengthen respectful and equitable impact practices for equity-seeking groups
- Need to be cognizant of the capacity of artists and arts organizations to collect and analyze data

- The focus should be on co-designing useful impact practices that provide new insights and add value to artists / users themselves
- The Opera.ca framework includes useful domains, particularly "Truth and Reconciliation" (which includes subdomains related to Cultural humility, Authenticity, Integrity, Awareness, Agency, Reciprocity)
- The Culture Counts framework is also useful, and their process is "triangulated", involving self, peer, and public assessments
- An Australian model indicates that project outcomes should be evaluated across three important elements: 1) Perspectives of change (i.e., who perceived and experienced the change);
  2) Dimensions of change (i.e., what type of change occurred); 3) Degree of change (i.e., how much change occurred)
- The Equitable Evaluation Initiative outlines three key principles: 1) Evaluation and evaluative work should be in service of equity; 2) Evaluative work can and should answer critical questions about equity; 3) Evaluative work should be designed and implemented commensurate with the values underlying equity work
- Kirkness & Barnhardt's "The four R's" outlines four principles for incorporating Indigenous values in research and evaluation: Respect, Relevance, Reciprocity, and Responsibility.

The remainder of this report is organized into sections summarizing the initial community input from Artse sessions, arts-specific frameworks, as well as non-arts frameworks and resources that could potentially be adapted to the arts. This is followed by reflections on future considerations leading to the design of an equitable impact practice framework for Hatch Open + Artse United.

## Initial community input regarding evaluation

When asked about their approaches to evaluation, design thinking workshop participants for Hatch Open + Artse United in Toronto, Sudbury, and Ottawa struggled to identify ways to collect and analyze relevant information to capture and communicate their external impact, or to identify insights that improve internal excellence and efficiency.



For example, two participants shared: "(It is) not an issue we have thought about", and "We need to think about business intelligence more ... I don't believe we take enough time to do that currently".

Overall, participants identified ten key evaluative domains, including: administration, human resources, programming, finance, sales, promotions, social media, fundraising, audiences, and equity. For example:

#### Administration

In managing and evaluating their day-to-day administrative data, some participants identified the need to visualize internal "data/statistics in creative ways to display a story", and to access comprehensive databases of external industry arts and cultural industry reports to inform their "analysis about the sector", and generate and compare "historic data" easily.

Others desired a "place where stats can easily be entered in real time" such as "attendance, box office revenue, number of artists", as well methods to transfer statistical information to "funders and promotional materials". Additional strategies and desires for administrative assessments included sharing "insights into policies, practices, and procedure documents" and access to "quantitative and qualitative data to evaluate

and share the challenges, successes, and impacts of my arts career".

#### Human resources

Participants desired information on volunteer management such as "skills, participation, and feedback", and information for boards such as "skills, background, and contributions". Information for new and current staff such as "impact of professional development", programming decisions and updates, meetings notes, and "staff stories that proceeded me" were also subjects that came up.

#### Programming

Participants voiced the need for software that helps "identify and address gaps and needs in programming". This might include tools such as events calendars for "planning/routing and other shared opportunities", or "archives of reviews, playbills, recordings, photos, and promotional videos". Keeping track of information about past and present artwork such as materials used, "dimensions, photos, prices, and artist statements" was also important.

#### Finance

In terms of budgeting, participants pinpointed tracking "percentage of budget time and money" to organization's activities, assisting with "reasonable asks" to government and corporate funders, and identifying best/worst/most likely budgets based on program changes. Benchmarks of "staff salaries, artists' fees, advisory groups" were also identified by participants as important to them. Additionally, one participant sought to gain data on how organizations are "changing communities' investment and prioritization of arts and culture".

#### **Sales**

Participants identified that information about "bums in seats" and "number of participants in sessions" was important to them. Tools such as "visual graphics that show the impact of attendance figures and demographics," "box office theories" that analyzed changing variables, and automated reporting customized to need were also mentioned.

#### **Promotions**

Tracking promotions with associated sales numbers and "media engagement/online presence" was of concern to participants. Promotions in relation to search engines also came up: "Google analytics that shows me the top earning campaigns or platforms from which I can take an informed decision", "click-through rates on Google ads", and "amount of presence when doing a Google/Bing search (i.e., number of online listings, articles, reviews)". Participants also desired data that provided an analysis of brand and message consistency.

#### Social media

Participants identified "digital realm hype (online, social, blogsphere)", "number of social media likes, shares, retweets, positive comments, views, reviews", "number of 'bounced' postings online", and "number of newsletter opens" as meaningful data that could be collected.

#### **Fundraising**

For participants, tools that address "grant development management or stewardship" would be beneficial. When reporting to funders, ways to "capture the impact of an organization, sell our brand to sponsors, and create an understanding of why what we are doing is worth funding/investing in" were identified as

important. Participants were also interested in data regarding "in-kind donations", and "donor likes, memberships, birthdays, and where else they donated to".

#### Audiences

Participants identified relationship building/maintaining and connectivity as areas of importance in audience data. This included using qualitative audience experiences through digital, "maintaining relationships through successes in conflict resolution", and recording audience engagement through testimonials, "talkbacks, feedback surveys, (and) ongoing communications".

Participants also saw feedback from the other side of the curtain as beneficial data, such as written and oral statements from "cast-mates and production teams". Regarding connectivity, participants said using digital to help audiences "feel connected (to us) even if they cannot physically (be present)" and "what made (people) want to connect with the organization" was important.

#### Equity

Equity statistics such as the "gender breakdown of lineup, audience, etc." were identified as relevant data. One participant identified several examples of desired impact measures for Black theatre companies:

- "How many Black-identifying people are working in theatre and do they see themselves and their stories represented
- Stories of successful Black theatre artists supported by our company; number of Black audience members compared to other theatres
- Measuring stress and workload for staff through one theatre season and how does this change depending on how many shows we are running or in-between shows
- Is the impact of our stories on stage worth the stress/work impact on staff
- Are staff being paid enough
- Do Black artists feel empowered and taken care of
- Are there new Black Canadian plays and are they getting recognized or receiving awards".

## Arts-specific assessment frameworks

The following section provides an overview of ten frameworks and approaches to qualitative and quantitative assessment and evaluation of the arts that may guide the design of new impact practice solutions like Hatch Open + Artse United, including:

- Qualitative Impact Framework (Canada) Canada Council for the Arts and WolfBrown, 2019
- Civic Impact Framework (Canada) Opera.ca, 2019
- Culture Counts (Australia + England) Pilot in 2014, toolkit in 2018
- Laboratory Adelaide: The Value of Culture (Australia) Flinders University, ongoing
- Holistic Framework of Evaluation for Arts Engagement (Australia) Kim Dunphy, 2015
- UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions (International), ongoing
- Oakland Museum of California: Social Impact Score (USA) Oakland Museum, 2020
- Aesthetic Perspectives Framework + Continuum of Impact (USA), Americans for the Arts / Animating Democracy, 2017
- Artistic Vibrancy Framework (Australia), Australia Council for the Arts, 2009, update 2014

#### Canada Council's Qualitative Impact Framework

Canada Council for the Arts and WolfBrown, 2019

https://canadacouncil.ca/research/research-library/2019/12/qualitative-impact-framework

This Framework states that it "will help the Canada Council tell a richly textured and rigorously researched story about how its investments strengthen Canada's arts ecosystem and benefit the breadth and diversity of the Canadian public." The framework outlines four key goals:

- To gather evidence of impact of Canada Council's investments
- To help artists and organizations understand the impacts of their work
- To assist in strategic decision making
- To work in partnership with others to understand the impacts of the arts sector

Five areas of impact are identified, including impacts on:

- 1. The artistic practices of professional artists that fuel creativity in/outside the nonprofit arts sector
- 2. Favourable conditions and capabilities that enable arts organizations to sustain their creative aspirations and deepen their civic impact
- 3. Cultural meaning for the Canadian public
- 4. The experiences of national and international audiences and visitors
- 5. Long-term creative and social benefits to communities and society

The Framework recognizes different types of impacts by distinguishing them between *upstream* (impacts related to the Council's funding) and *downstream* (may be attributed, but limited, to the Council's funding).

Interestingly, the Framework notes that "the Council deliberately chose not to make the artists and organizations it supports responsible for demonstrating the value of our investments". The consultation report echoes a finding from the Hatch Open + Artse United consultations: "impact is often misunderstood, and most organizations need help to conceptualize and articulate their impact".

An Indigenous framework is being developed separately, led by an Indigenous research group (Archipel Research and Consulting). A report on Deaf and Disability Arts Practices in Canada is also expected in 2020 with Université du Québec à Montréal (UQAM) and a team of university researchers.

#### **Opera.ca Civic Impact Framework**

Opera.ca, 2019 http://www.opera.ca/announcing-opera-civic-impact-framework

This framework identifies five domains of the impacts of opera:

- **"Experience** Subdomains: Enjoyment, Captivation, Catharsis, Cognitive growth
- Access
  Subdomains: Exposure, Comfort, Belonging, Conversion, Interest
- Education
  Subdomains: Engagement, Core competencies, Connections, Pride, Appreciation

#### • Community

Subdomains: Relevance, Pride, Empathy, Cohesion, Belonging, Motivation, Confidence, Selfexpression, Skills development, Mental health + well-being

• Truth and Reconciliation Subdomains: Cultural humility, Authenticity, Integrity, Awareness, Agency, Reciprocity."

Currently, Opera.ca is embarking on a strategic effort to digitize this framework with the support of Canada Council for the Arts' Digital Strategy Fund from Winter 2020 to Fall 2021. A description of this effort follows, taken from Canada Council for the Arts' website:

"This initiative will create a standard digital cultural evaluation measure using the Opera.ca civic impact framework as a kernel, work with the wider arts sector through Mass Culture to standardize it, and develop the open source Al/ontology for it to be interoperable with other frameworks such as the UNSDGs (United Nations' Sustainable Development Goals), the CIWB (Canadian Index of Wellbeing) and the Common Approach Project (to Impact Measurement, Carleton University), aligning arts outcomes with non-arts community outcomes leading to greater collective impact."

Concerning the next steps necessary to develop effective impact practice solutions and technologies for the arts and culture industry, Christina Loewen, Executive Director of Opera.ca, also provided the following statement to the authors:

"Interoperability Is the Outcome: A key outcome of the digital strategy project Opera.ca is developing the artificial intelligence (AI) to connect arts impact to those of our non-arts community partners. As this (Artse United/Hatch Open Research Insights) report highlights, there is an abundance of arts and non-arts impact frameworks that have been developed, and more consideration is needed for how they all fit together. This is key to enabling the arts to make meaningful contributions to discussion around the larger issues and challenges facing our communities and the world today."

#### **Culture Counts**

Australia + Arts Council England, ongoing https://culturecounts.cc

A for-profit, proprietary model, there is relatively little public information on the Culture Counts website about their qualitative metrics framework.

Culture Counts' CEO Michael Chappell was a keynote speaker at ArtsPond's Digital Arts Services Symposium in Toronto (March 2019) where he shared some insights. Archival video of Michael Chappell's keynote address, *Cultivating new models and technologies to measure value and impact of the arts*, outlines five domains and 21 corresponding subdomains that the Culture Counts model uses to help illustrate the value of arts and culture:

#### • "Cultural

Stimulation; Enrichment; Insight; Appreciation; Belonging

• Social Equality; Recognition; Bonding, Bridging & Linking; Safety & Security; Mental & Physical Health

- **Civic** Collaboration; Positive Future; Citizenship; Community Belonging
- Economic
  Increased Reach; Sector Development; Individual Economic Benefit; Employment Prospect
- Place
  Natural Connection; Awareness; Sense of Place."

Additional (but older) information can be gleaned from early pilot reviews and critiques:

#### Quality Metrics Pilot (United Kingdom), Culture Counts and Arts Council England, 2014 Impact and Insight Toolkit (United Kingdom), Culture Counts and Arts Council England, 2018–ongoing

#### How Culture Counts works:

"To conduct the assessments, a set of qualitative statements are completed via a survey, the answers are ascribed a numerical value, which then provide a measure of the quality of the art or cultural activity being assessed. These data can then be accessed, compared and manipulated through the Culture Counts dashboard."

The process is "triangulated", involving self, peer, and public assessments. Organizational self-assessments are carried out both before and after events take place.

All three assessments ask for respondents' ratings of the following elements, using a sliding scale of agreement or disagreement:

- "Enthusiasm (i.e., I would come to something like this again)
- **Concept** (i.e., it was an interesting idea)
- **Presentation** (i.e., it was well produced and presented)
- **Local impact** (i.e., it is important that it is happening here)
- **Rigour** (i.e., it was well thought through and put together)
- **Captivation** (i.e., it was absorbing and held my attention)
- **Challenge** (i.e., it was thought-provoking)
- **Relevance** (i.e., it had something to say about the world in which we live)
- Distinctiveness (i.e., it was different from things I have experienced before)."

The self and peer assessments also include:

- "Originality (i.e., it was ground-breaking)
- Risk (i.e., the artists/curators really challenged themselves)
- Excellence (i.e., it is one of the best examples of its type that I have seen)."

#### Critiques of Culture Counts

The Culture Counts framework has received important critiques and reviews. An evaluation of the initial trial provided a favourable review but pointed out that problems related to the descriptions of some elements: "there are some concerns about accessibility of language for non-specialists and a potential need for further refining of language with specific [quality metrics] dimensions to better clarify what is meant and/or provide additional nuance or differentiation."

Stronger critiques have come from two articles published in Cultural Trends: Accounting for quality: arts evaluation, public value and the case of "Culture counts" (Gilmore, Glow, and Johanson, 2017) and Counting

## *culture to death: an Australian perspective on culture counts and quality metrics* (Phiddian, Meyrick, Barnett, and Maltby, 2017).

Accounting for quality (UK and Australia) identified critical issues related to "the role of the expert, the involvement of the public in defining value, the efficacy of the system, both in terms of satisfactory data volume and its reporting mechanisms, and the capacity of organisations to participate in complex data cultures with diminished organisational capacities."

The evaluation results tended to confirm existing perceptions rather than create new insights. "In both trials, respondents consistently reported that Culture Counts was more successful in capturing data to confirm existing perceptions and values, than necessarily introducing new insights into the organisations' activities".

On the positive side, the presentation of survey results was found to be "attractive and professional, with easy-to-read data and graphics that would look good when reporting to funders and other stakeholders." In addition, the platform did help organizations build their evaluation skills. However, their success was often dependent on strong support from Culture Counts consultants.

*Counting culture to death* (Australia) strongly critiqued the Culture Counts system: "Metrics-based approaches to understanding the value of culture imply homogeneity of artistic purpose, invite political manipulation and demand time, money and attention from cultural organisations without proven benefit."

Commentary on the Arts Professional website (UK) cited the article's finding that there may be issues of misuse and "weaponizing" of quantitative data: metrics such as Culture Counts will be "used as weapons, both of attack and self-defense. Artists competing for funds to realise a vision will not resist the temptation to trumpet 'a 92 in the ACE metric' any more than vice chancellors have refrained from boasting of their rankings in university league tables." In other words, the numbers may not be used "with care, as indicators of well-understood value-generating creative processes."

#### Laboratory Adelaide: The Value of Culture

Flinders University, Australia, ongoing https://labadelaide.com.au/

The major outcome of this multi-year project from an Australian university will be "a set of cultural value assessment tools with open access for cultural organisations to adapt and adopt. These tools will focus on instruments of account to provide cultural organisations with new cultural reporting checklists and templates in the assessment of total cultural value."

The aims of the project are:

- "To better understand the practices of the cultural reporting of data and the flow of information from organisation to stakeholders including government, grants bodies and patrons
- To develop and trial mixed methodologies for analysing, measuring and reporting on the total cultural value of Australian arts and cultural organisations
- To build capacity amongst arts and cultural organisations to measure and communicate the value of what they do, beginning in Adelaide
- To contribute substantially to, and provide a platform for, the local, national and international discourse concerning culture's value in academic and industry fields."

"In an era in which the cultural sector has grown increasingly interdependent and complex, this project will provide robust mechanisms for stakeholders to properly assess the cultural value they provide to the individuals, communities, cities, states, nations and regions they serve."

"There is no magic bullet for 'demonstrating' the value of culture. The problem itself is the culmination of years of state and federal policy-making that has consistently failed to grasp how value accrues in the arts and cultural sector (answer: in many and wayward ways and – the kicker – often over long periods of time)."

The researchers note that the cultural sector is linked to "all kinds of value: economic, health, social cohesion, public, longitudinal, institutional, intrinsic, instrumental, personal, transformative, livability. Anything and everything: just like culture itself."

"How do you put an old-growth forest on a balance sheet? How do you talk about the investment in arts and culture that may not pay off for decades? They both require longer time frames than electoral cycles or forward estimates can encompass. Once you start seeing culture as purely a series of secondary effects, no matter how well intentioned you are, you are lost. Space has to be found for the idea that arts and culture contribute to our society in and of themselves, and not just as improvements to the economy, wellbeing, mental health, social inclusion, youth outcomes and urban renewal."

#### Holistic framework of evaluation for arts engagement

#### Australia (Kim Dunphy, 2015)

https://www.culturaldevelopment.net/wp-content/uploads2/Dunphy-K.-2015.-A-holistic-framework-of-evaluation.pdf

This framework developed by an Australian researcher includes six outcome domains, attempting to connect "all aspects of human experiences and the natural world":

- Cultural
- Personal well-being
- Social

- Economic
- Civic
- Ecological

The framework stresses the need for evaluation approaches that integrate different methods and stakeholder perspectives: "Fewer evaluation approaches apply integrated methods, where perspectives of a range of stakeholders are considered, which might include participants (the active art-makers), audience members (the receptive participants), investors, including arts leaders, other staff, funders and policy makers, and the wider community."

"The framework offers a method of representing evaluation findings across three elements of change:

- Perspectives of change (who perceived and experienced the change);
- Dimensions of change (what type of change occurred); and,
- Degree of change (how much change occurred), to arrive at an overall assessment of project outcomes."

The framework argues for the importance of integrating qualitative information. Qualitative data, which might be "collected through interviews or artistic responses, can be converted into a quantitative form and represented pictorially in this framework. The judgement of experts, in this case, the evaluators familiar with the data, could be used to complete this process." (HSR note: This is an interesting but potentially problematic approach: "who are the experts?" could be in dispute in different communities.)

"At the point of writing, this framework has been demonstrated and discussed with more than 400 cultural development and evaluation professionals in presentations and workshops led by this author, in three states of Australia and USA and Europe."

# UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions

#### https://en.unesco.org/creativity/convention/monitoring-framework

UNESCO has developed a monitoring framework for its Convention on the Protection and Promotion of the Diversity of Cultural Expressions. "Together, [the 11 areas of monitoring] set a global benchmark for cultural governance and serve as a 'compass' for cultural policymakers and professionals alike." The 11 areas are:

- "Cultural and creative sectors
- Media diversity
- Digital environment
- Partnering with civil society
- Mobility of artists and cultural professionals
- Flow of cultural goods and services

- Treaties and agreements
- National sustainable development policies and plans
- International cooperation for sustainable development
- Gender equality
- Artistic freedom."

## Oakland Museum of California: Social Impact Score

#### https://news.artnet.com/art-world/oakland-museum-social-impact-1780698

The Oakland Museum, in collaboration with social scientists, "devised an innovative plan to take stock of both its ability to connect with visitors and to foster connections between visitors themselves." The Museum wanted to identify its social impact in order to answer the key question, "what is the difference we are trying to make in the world?"

"We've been trying to do the work over the last several years of focusing on diversifying our audience," added Museum director and CEO Lori Fogarty. "Now we have some data that says we may need some different techniques with different audiences. We can't bring a 'one-size-fits-all' approach to the experiences here."

In a survey of over 1,700 visitors, the Museum found that 97% felt "welcome and at ease" at the museum, while 95% believed in the institution's commitment to telling "stories from different communities".

After developing a social impact score, the Museum found that "women, museum members, and return visitors reported notably high scores, while people of color and those who come from homes with incomes below the \$50,000 threshold scored low".

"The survey will continue and it's something that we can measure through time, see if we're making gains or where there's still work to be done," said the Museum's associate director of evaluation and visitor insight, Johanna Jones. "That was always the intention—it wasn't a one-time study, which is easy to do. It's ongoing. We want to embed it in our work so it can inform us moving forward."

#### Americans for the Arts / Animating Democracy: Aesthetic Perspectives http://www.animatingdemocracy.org/aesthetic-perspectives

Animating Democracy launched the Evaluation Learning Lab in 2014 to promote evaluation that "embodies values and practices congruent with arts and social justice work: equity, inclusion, understanding context, and the role of arts and culture".

The Aesthetic Perspectives Framework was developed in 2017 with 11 attributes for "evaluating excellence in civically and socially engaged art:

#### • Commitment

Creative processes and products embody conviction to the cause espoused through the work

#### Communal Meaning

The creative work facilitates collective meaning that transcends individual perspective and experience

#### • Disruption

Art challenges what is by exposing what has been hidden, posing new ways of being, and modeling new forms of action

#### • Cultural Integrity

The creative work demonstrates integrity and ethical use of material with specific cultural origins and context

#### • Emotional Experience

Arts for Change facilitates a productive movement between 'heart space'—the emotional experience that art evokes—and the 'head space' of civic or social issues

#### • Sensory Experience

Vivid sensations deepen the experience of the creative work and heighten the power of its messages and the potential for change

#### • Risk-tasking

The creative work assumes risk by subverting dominant norms, values, narratives, standards, or aesthetics

#### • Openness

The creative work deepens impact by remaining open, fluid, transparent, subject to influence, and able to hold contradiction

#### Resourcefulness

Imaginative use of available resources drives artistic innovation and demonstrates responsible social and environmental practice

- **Coherence** Strong ideas express with clarity advance both artistic and social purposes
- Stickiness

The creative work achieves sustained resonance, impact, or value."

Animating Democracy's Continuum of Impact categorizes the differences that arts and culture make into six realms:

- "Knowledge What people know (awareness, understanding)
- **Discourse** How people communicate (deliberation, dialogue, media)
- Attitude What people think and feel (values, motivation, vision)
- **Capacity** What people have and can do (social capital, leadership, creative skills, civic engagement)
- Action What people do (participation, mobilization)
- Policies What change is sustained (systems, conditions, access, equity)."

#### Australia Council for the Arts: Artistic Vibrancy

https://www.australiacouncil.gov.au/ebook/artistic-vibrancy/publication/contents/pdfweb.pdf

Australia Arts Council's Artistic Vibrancy Framework and Self-Reflection Tool includes five dimensions that represents an "aspect of an organisation's overall artistic health:

#### • Great Art

Demonstrates integrity of process. Embodies excellence of craft and skills. Demonstrates imagination, distinctiveness, and originality. Contributes to artistic practice. Engages with the diversity and complexity of contemporary life. Is relevant in a local, national, and global context.

#### • Great Artists

Are regarded by their peers as leaders or with potential to be leaders in their practice. Have a unique aesthetic identity and body of work. Influence arts and creative practice. Can benefit from the wider community of organisations supporting and promoting the value of art. Contribute to innovation and new thinking in their artform and wider culture.

#### • Engaged Audiences

Experiences captivation, aesthetic enrichment, emotional resonance, intellectual stimulation and social bridging or bonding through their arts experience. Includes those who experience art directly, as well as people who might participate in other artistic programs around the art experience.

#### • Engaged Communities

Is a respected partner in any collaboration and enjoys shared decision-making. Acknowledges diversity and has differences of opinion, ideas, and artistic preferences. Supports participation and engagement by all. Is the expert about its own circumstances and cultures and has authority within a partnership. Owns and celebrates shared outcomes. Has connections with artistic leaders in the community.

#### • Vibrant Society and Culture

Help to make art a part of daily life. Promote widespread, dynamic social and cultural conversations. Help to make Indigenous arts and culture strong and accessible. Value and represent diversity."

Across all five dimensions, an "artistically vibrant" organization also strives for:

#### • "Relevance

Relevant arts organisations support work that: Resonates with audiences and stakeholders. Acknowledge and embody diversity. Connect with the lives and times of contemporary society.

#### • Integrity

Arts organisations which embody in integrity: Realise their artistic vision in their programming. Support artists to realise their artistic ambitions. Respect and nurture artistic/cultural processes.

#### • Quality

Arts organisations which strive for quality: Are committed to rigour around process and outcomes. Invest in continuous learning, improvement, and artist development.

#### • Distinctiveness

Distinctive arts organisations: Have unique artistic visions. Contribute to, shape and change the arts landscape. Demonstrate cultural and creative leadership.

#### • Learning

Arts organisations which are committed to learning: Respect the critical reflective process. Gather and reflect on feedback. Act on the outcomes of reflection when needed."

### Other useful arts resources and guides

#### Qualia http://qualia.org.uk/

Developed by Chelthenham Festivals, i-DAT, and others, Qualia is an open source software project on GITHUB (built on python, javascript, HTML) which "measures the mood of arts and culture audiences using a user-friendly interface that 'gamifies' the evaluation process. Qualia enables users to gain tangible rewards for taking part – such as discounts and exclusive offers – making data collection easy, fun and beneficial. Meanwhile, venues, organisations and the arts and culture sector generally benefit by receiving accurate feedback that can only improve culture experiences."

The Qualia Web Engine with an open API "can plug into a range of platforms, such as social media (Facebook and Twitter), ticketing (Eventbrite and Tessitura), geolocation (Google Maps). It can also scape data from existing website for easy access to scheduling data." The web engine supports real-time data processing, analytics, infographic, and social media sentiment analysis.

The Qualia App for Android and iOS allows audiences members to "act as human sensors, feeding back real-time responses to your events and mapping the audience movement through your venue. The app provides: personalized event scheduling, pre and post event feedback, mood reporting, social media feeds and individual posting, user demographics, shared GPS mapping."

A Qualia kiosk facility also provides larger screen "presentation of schedules and events, audience feedback through onscreen questionnaires, audio monitoring around the probes, smile recognition software for capturing audience mood, QR code for NFC ticket registration and tracking."

#### **Evaluation Toolkit for the Voluntary and Community Arts** http://artscouncil-ni.org/news/arts-council-launches-evaluation-toolkit-for-the-arts

Arts Council of Northern England's Voluntary and Community Arts Evaluation Toolkit (2004) "provides a consistent and sympathetic method of measuring the social impact of arts groups working in the community and voluntary sectors."

#### **Partnerships for Learning: A guide to evaluating arts education projects** https://www.culturehive.co.uk/resources/a-guide-to-evaluating-arts-education-projects/

Felicity Woolf and Arts Council England's Partnerships for Learning (1999) is an "authoritative booklet to help everyone involved in arts education projects understand clearly and to evaluate effectively, according to their particular needs. Arts-based projects are difficult to evaluate and the guide does not try to suggest that there is only one way of approaching evaluation. It aims to provide a flexible framework, which can be applied in many different situations and used to evaluate short or more extended projects. It provides context, advice, guidelines and checklists."

### Non-arts frameworks and guides

#### **Equitable Evaluation Initiative**

https://www.equitableeval.org/ee-framework

This framework proposes three principles of equitable evaluation:

- 1) "Evaluation and evaluative work should be in service of equity."
  - "Production, consumption, and management of eval and evaluative work should hold at its core a responsibility to advance progress towards equity"
- 2) "Evaluative work can and should answer critical questions about the:
  - Ways in which historical and structural decisions have contributed to the condition to be addressed
  - Effect of a strategy on different populations
  - Effect of a strategy on the underlying systemic drivers of inequality
  - Ways in which cultural context is tangled up in both the structural conditions and the change initiative itself."
- 3) "Evaluative work should be designed and implemented commensurate with the values underlying equity work:
  - Multi-culturally valid
  - Oriented toward participant ownership."

Equitable evaluation involves pushing back against orthodoxies of evaluation, which can be based on colonialist and/or racist assumptions disguised as "neutrality". "Over time, the philanthropic sector has developed a set of evaluation 'orthodoxies', or tightly held beliefs about evaluative practice. Orthodoxies are often invisible, masquerading as 'common sense'. They are believed to be foundational and affect the undercurrents of organizational culture.... Many of the current orthodoxies act like a drag on equity efforts, and in some cases, reinforce inequities".

The framework also provides insights into:

- Working to contribute to equity-seeking communities (not extract from them via evaluation)
- Working to provide new insights for artists and organizations themselves
- Aspects to consider in an equity-based evaluation
- Challenging conventional notions (e.g., who is an expert or peer)
- The need to have our initial work reviewed / evaluated by diverse stakeholders
- Research on the most effective forms of consultation with different communities.

#### Good Finance UK: Social Impacts Matrix for the Arts

#### https://www.goodfinance.org.uk/impact-matrix/filter/68

Good Finance UK defines social impact as "the effect on people and communities that happens as a result of an action or inaction, an activity, project, programme or policy.... It is important for every organisation to measure their social impact so they can tell the story of the change they make - their supporters, stakeholders and funders' will want to know this." The organization outlines social impacts in the arts, heritage, sports, and faith for individuals and organizations:

#### "INDIVIDUALS

Finds meaning and fulfillment from engaging with arts, heritage, sport, and faith

- Increased engagement with and participation in art, heritage, sport, and faith activities
- Improved experience of life as a result

- Improved appreciation of and/or satisfaction regarding their engagement with arts, heritage, sports, and faith
- Has access to a range of possibilities in the arts, heritage, sport, and faith

Develops cultural skills and confidence in areas that interest them

- Improved confidence in an area of interest
- Developed a new skill in the past year

#### COMMUNITIES

Public and corporate policy and expenditure that supports the arts, heritage, sport, and faith

- Improvements in policy and legislation
- Improved government investment, expenditure, and procurement

Strong public awareness of and participation in the arts, heritage, sports, and faith

- Improved stakeholder participation with decision-making and with issues
- Improved sectoral understanding as to how cultural activities and services can be improved, and benefit society
- Improved public awareness and engagement

High quality, affordable, accessible, and inclusive cultural services available to all

- Improved availability of good quality, affordable sports services
- Improved availability of good quality, affordable faith services
- Improved availability of good quality, affordable cultural services."

#### **Other useful non-arts resources**

#### Centre for Social Innovation Impact Dashboard https://impactdashboard.org

The Toronto-based Centre for Social Innovation developed a common approach to impact measurement for its members. "The Impact Dashboard allows you to track, visualize, and share your impact with your stakeholders. Simply fill out and customize the different dashboards, use our Logic Model tool to articulate your Theory of Change, and input your Key Performance Indicators to create charts." Details are available for Centre for Social Innovation members.

#### **Common Approach to Impact Measurement: Organisational Information** https://carleton.ca/commonapproach/wp-content/uploads/20191207-Organisational-Information-1.pdf

This report outlines key metrics of organizations' activities, including indicators related to:

- Organizational Profile (16 items, including "Theory of Change or Impact Model")
- Project Information (11 items, if seeking funding for a specific project)
- Financial Information and Indicators (5 core items plus 10 supplemental items. The five core items are: Current Assets; Total Assets; Total Liabilities; Total Revenues; Total Expenses)
- Financial Health of the Organization (6 key indicators: Liquidity; Resiliency; Sustainability; Growth; Administrative Capacity; Revenue Diversity)

## Actionable Intelligence for Social Policy:

A Toolkit for Centering Racial Equity Throughout Data Integration

University of Pennsylvania, Philadelphia, 2020 https://www.aecf.org/m/resourcedoc/aisp-atoolkitforcenteringracialeguity-2020.pdf#page=3

A useful resource providing case study insights, tools, and recommendations on centering racial equity throughout the data life cycle including planning, data collection, data access, algorithms/statistical tools, data analysis, reporting and dissemination. The resource also introduces key terms, concepts, first steps, benefits, limitations and risks to data sharing and integration to help guide partnerships, collaboratives, and community initiatives for universities, governments, civic and neighbourhood associations, and other non-profits.

#### Social Impact Canvas

#### https://www.socialimpact.tools

This Canadian-Scottish collaboration "explains the topic of impact measurement in straightforward terms and provides the practical tools you will need to plan, measure, communicate and grow your social or environmental impact". The platform was created by Social Value Lab (Canada) and the Social Enterprise Institute (Scotland).

#### **iiiWA** www.jiiWA.com

"jiiWA uses stakeholder engagement to simplify data collection and management for impact organizations like yours. Learn more about your programs and the people you serve, through data." jiiWA offers "cloud software that uses online stakeholder engagement to easily collect, manage and analyze your participant data."

#### First Nations Information Governance Centre https://fnigc.ca/splash

This Centre works with its "First Nations partners in our collective efforts to help them achieve data sovereignty in alignment with their respective distinct world views." The Centre also proposed a First Nations Data Governance Strategy.

## National Collaborating Centre for Aboriginal Health

#### https://www.nccih.ca/

Indigenous Approaches to Program Evaluation is a fact sheet that "reviews different types of program evaluation activities and discusses Indigenous approaches and ethical guidelines for engaging in program evaluation." The resource identifies challenges faced by Indigenous scholars including "the lack of trust that many Aboriginal communities have for research processes driven from a Western scientific perspective.... Ongoing challenges for research in Aboriginal contexts are how to: reframe (focus on community stimulated research matters); rename (incorporate Indigenous world views and realities); and reclaim the research environment (take control of our lives and land) (Chouinard & Cousins 2007; Smith, 1999)."

Kirkness & Barnhardt's "The four R's" is also outlined as a possible framework for developing academic research and procedures in an Aboriginal context, including:

#### • "Respect

Valuing the diverse Aboriginal individual, cultural and community knowledge. Respect includes understanding and practicing community protocols, being reflective and non-judgmental, being able to hear what is being said, and building on cultural, social, and spiritual values that can only come from the community.

#### • Relevance

Relevance to community and cultural needs and experiences. Communities should be part of designing the research questions as well as the methods and interpretation of findings. The researcher/evaluator must be clear about their intentions, and factual information must be useful for the local governance.

#### • Reciprocity

Where both the community and researcher/evaluator benefit from a two-way process of learning and research. The evaluator must ask the following questions: What will be left behind? What has the community learned/gained? Has knowledge been shared through the whole process?

#### • Responsibility

Where there is active empowerment for community members through full engagement and participation. Responsibility means that the evaluator continues to develop and maintain credibility with the community by considering all perspectives and working collaboratively and sharing findings."

#### **Canadian Evaluation Society**

#### https://evaluationcanada.ca/

"The Canadian Evaluation Society is dedicated to the advancement of evaluation theory and practice. We promote leadership, knowledge, advocacy, and professional development."

#### **Future considerations**

As a starting point, future evaluation efforts should make sure that they contribute to equity-seeking communities through their processes and results. This means that the Hatch Open + Artse United framework needs to work toward providing new insights and adding value to artists / users themselves. (Culture Counts pilot projects have been criticized for confirming existing perceptions more than adding new insights.)

Here are some potential starting points from the Equitable Evaluation framework noted above:

"To align evaluation practices with an equity approach—and even more powerfully, to use evaluation as a tool for advancing equity—evaluators must simultaneously consider all of these aspects:

- Diversity of their teams moving beyond cultural to disciplines, beliefs, and lived experiences
- Cultural appropriateness and validity of their methods
- Ability of the design to reveal structural and systems-level drivers of inequity (present-day and historically)
- Degree to which communities have the power to shape and own how evaluation happens."

An Hatch Open + Artse United framework should probably challenge and interrogate concepts like who is an expert, who is a peer (in peer review), etc. An Equitable Evaluation blog post makes an important point:

"There are RFPs and funder expectations that equate to 'buying success' because we only want to fund what is 'guaranteed' to work with a 'proven track record' (the language of certainty). The under-resourcing and over-burdening of the social sector where the demands for responsibility and accountability are not remotely matched with the necessary support, leading to fear and aversion to risk and being punished for not delivering exactly what is asked for.

The ways that the epistemologies of certainty and their accompanying methods (e.g., randomized control trials) as accepted and positioned as more credible, valid, and valuable than epistemologies and methods of complexity and uncertainty (even in casual language like, 'well ideally we'd have harder data on this, but for now this is what we're seeing on the ground' — anyone obsessing over exponential charts lately knows that the most useful data is the data you have to work with and that numbers don't bring certainty, just a different kind of perspective best complemented with other kinds of data, like stories about what other people and countries are doing to cope and manage in highly emergent circumstances)."

In a longer-term evaluation approach, Hatch Open + Artse United may want to consider ideas like:

- **Compiling a literature review internally on equity-based evaluation** and then having it assessed / evaluated by some diverse consultants (Indigenous, disability arts, Black or other racialized groups, etc.). This approach, to "evaluate the evaluators", could be based in reciprocity and demonstrate accountability to the diverse equity-seeking communities that are empowered through Hatch Open + Artse United and related projects.
- Conducting research on the most effective forms of consultation with different communities. What are better ways of reaching people who may be neurodiverse, Deaf, living with a disability, in remote locations, incorporating Indigenous worldviews etc.? Hiring people who can help Hatch Open + Artse United outreach to these communities would be a place to start. Does the method of outreach/consultation need to vary?
- Conducting research on whether there is an equity-based AI framework for analyzing qualitative data. What are the approaches to this, given the problematic nature of so-called "neutral" tech concepts like algorithms? Who is working in this field / on this problem?

#### **Profile**



# Cultivating progressive ideas and untapped potential in the arts into exceptional, everyday shared realities for collective impact on-the-ground and in-the-cloud.

ArtsPond is a changemaker of a different sort.

Devoted to radical inclusivity, our mandate is to strengthen the potential of artistic expression to nurture healthy human ecosystems that cultivate equity and social cohesion by boosting **social**, **spatial**, **economic**, **and digital justice** and other urgent systemic issues in under-served communities across Canada and beyond.

Purposefully, we foster cooperative actions fusing values and practices from community-engaged arts, human-centered design, evidence-based action and applied research, social innovation, social finance and collective impact as a means to uproot intractable systemic issues from gentrification and economic inequality to the digital divide.

Across diverse urban, rural, and virtual communities, our vision is to **strengthen collective human engagement and belonging** through the cultivation of deep, **lifelong connections to the capacity of community-engaged artistic expression to sustain positive social change for all**. Day to day, we live by our guiding vision for incubating a more democratic society: *Shared prosperity in. Solitary precarity out*.

Cultivating a more creative and open society, we intentionally adopt collaborative practices **crossing cultural, economic, geographic, political, social, and technological boundaries**. We actively enable and celebrate the perspectives of diverse **interdisciplinary**, **intergenerational**, **intercultural**, and **interability** voices. We do so with the assumption that the full spectrum of humanity is better together than we are apart, and community-engaged creativity is a crucial element to bolster and intertwine the best in us all.

Founded as a grassroots entity in 2014, and federally incorporated as a non-profit in 2016, ArtsPond's major actions currently include **Groundstory** (spatial justice), **I Lost My Gig Canada** (economic justice / COVID19 pandemic response), **DigitalASO**, **Artse United + Hatch Open** (digital justice).



Hatch Open is an open source Arts Resource Planning SaaS (Software as a Service) responding to the full spectrum of business management needs of small creators and producers in arts and culture.

Over time, Hatch Open will apply an iterative process to gradually prototype an integrated suite of quality digital tools including **project management**, **financial management**, **constituency relationship management**, **team collaboration management**, **asset management**, **qualitative + quantitative business intelligence analytics**, **impact investing** and more.

Users may manage and visualize their data in a completely secure and private environment, or opt-in to share and/or benchmark their activities with others via anonymous or linked open data infrastructure.

Phase 1+2 prototyping focuses on the visualization and benchmarking of **private + public business intelligence insights** including core financial and activity statistics for individuals and small producers in the **visual**, **performing and disability arts**. Other disciplines and features will be addressed in subsequent phases.

Additional activities include **design thinking workshops + public consultations**, and **innovation research and development** to address knowledge gaps in the digital transformation of arts services prioritizing the needs of under-served and equity-seeking groups in arts and culture.



### Hatch Open Impact Value Chain





Artse United is a platform cooperative promoting economic and digital justice for small creators and producers in arts and culture. Powered by Hatch Open, the mandate of Artse United is to:

+ Increase accessibility of digital tools by hosting public Hatch Open servers and providing technical support to improve literacy of priority Hatch Open users including low-income, rural, and remote regions

+ **Strengthen digital and data justice** by establishing a cooperative structure that empowers Hatch Open users to govern and take ownership of their shared digital lives and the data that lies behind them

+ **Reduce systemic economic precarity** by utilizing the power of data to improve individual and shared decision-making and illustrate collective value to help **incite greater social impact investing** in the arts

+ **Other opportunities** to strengthen the capacity and impact of the arts and culture industry through collective sharing and community-building.

Phase 1+2 activities focus on research and design of corporate and legal structures that secure the susstainability of Artse United long-term, including incorporation of platform cooperative, definition of membership requirements and benefits, open data intellectual property agreements, and more.



ArtsPond.com @ArtsPond8