



# Quality for Culture

Resource  
Guide

Quality Management Principles  
for Cultural Organisations

Written and curated  
by Beth Ponte

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# Foreword

Prof. Dr. Martin Zierold

*Director of the Institute of Arts and Media Management*

*University of Music and Theatre, Hamburg*

“A project about quality management for the arts, seriously?” When Beth Ponte approached me in 2017 with the idea to apply for a German Chancellor Fellowship at the Alexander von Humboldt Foundation, she had some convincing to do. I did not doubt for a moment her ability to be a brilliant fellow in the program, which is aimed at “tomorrow’s leaders” – I knew Beth Ponte from the “Global Cultural Leadership Programme”, a training and peer-learning programme organized by the EU’s Cultural Diplomacy Platform, where she was a participant in the first edition in 2016. Based on my encounter with her, I was impressed with her professionalism, her thirst for knowledge, her enthusiasm, and her visionary ideas for the cultural sector. Building on her experience as a young cultural leader with Brazilian orchestras, to me, she was not primarily a leader of tomorrow for the cultural field, but an aspiring and inspiring leader of today.

And quality management is the most exciting topic this person could think of for one year of research in Germany? I was somewhat disappointed. Was there a lot more to say about this topic than what had been discussed in a short,

but quite influential wave of conferences and publications on the relevance of ISO norms for cultural organisations a few years ago? Wasn’t this a topic for administrators, controlling experts and consultants rather than a burning issue in the context of cultural leadership? Yet in the process of numerous conversations, Beth Ponte was able to convince me that I was at fault and that indeed, quality management for the arts is a topic that is relevant and has a hidden potential to play a substantial part in innovation and transformation for cultural organisations. Rather than looking at “quality management” as a concept foreign to the arts, that is forced upon cultural organisations from the outside – which it surely sometimes is –, she encouraged and challenged me to look at what “quality management” could become, when we look at it through the lenses of cultural sector. In its core, Quality Management can genuinely challenge the daily routines and help us to ask the big questions: What is our purpose? Who are our communities? How can we change our institutions for the better? In this light, quality management can become a critical perspective for innovation in cultural institutions in the 21st century.

I dare the reader to let go of their preconceptions of what quality management might or might not be, and to follow Beth Ponte’s line of argument with an open mind. In the White Paper, she makes a compelling case on how quality standards and practices are already a fundamental part of some sectors in cultural industry and how it can become a method supporting cultural leadership, innovation, and transformation. The Resource Guide Beth Ponte has compiled makes accessible a vast body of knowledge, tools, and best practice cases from the arts and for the arts. Both documents deserve a broad audience from arts management and cultural policy alike. Everyone with an open mind and interest in the ongoing development of the cultural sector will be rewarded with a rich toolbox and an essential source of methods to inspire and improve their organisations and projects.

# Introduction

*“Administration can be a creative endeavor. What and whom do you administer to?”*

– Anthony Elms

## Quality Management for what?

In November 2018 I began my period as German Chancellor Fellow (2018/2019) of the Alexander von Humboldt Foundation and, as guest researcher at the Institute of Arts and Media Management (KMM) in Hamburg, developed a project on “Quality Management & Innovation of Arts Organisations”. I was inspired after meeting several arts institutions in German speaking countries that were certified to the ISO 9001 Quality Management standards. The research had two outcomes: **The Quality for Culture – White Paper**, in which I present the main standards, quality management systems and accreditation schemes in the cultural sector, and this Resource Guide.

Throughout the reading, interviews and other activities carried during my research period, I was amazed by the amount of knowledge on arts management produced in the last two decades – and how much of it is digitally available for free. It confirmed to me that we are in fact in a new phase when it comes to the development of arts management as a professional field. A time when we can see a fine and interesting balance between what we take and what we give, instead of simply adapting management approaches and tools made from and to private sector – what can possibly do worse than good. The idea of collecting, curating and sharing these resources seemed to me a good way to share the results of my research with the arts management community and to contribute to the continued development of this field.

Arts and cultural organisations - even when profit oriented - never work aiming just money. Art and all sorts of work produced by creative industries exist to improve and change our world’s perspective, to offer us new and transforming experiences, to make us reflect on and sometimes escape the reality that surrounds us, and mainly, to inspire and help us to

imagine other realities and new futures. This is a privilege and a responsibility in the world we live. The ongoing attacks to artistic freedom, cutting in cultural funding, and rising of intolerance and hate worldwide put arts organisations at stake while increasing their relevance in our societies. **It is clear that the cultural sector needs quality management more than never before. And that we have now all means to seek and develop quality management on our own terms.**

This guide brings out two key findings I made during my research. First, that the debate on quality management is not just about a question of being for or against it, since we all agree that cultural organisations are fundamental to our societies and that they must continue to exist and be improved. The debate is about HOW instead of IF. Second, that through its own standards and an incredibly diverse production of knowledge, the cultural sector is indeed contributing to a reimagination and improvement of what management should be.

It was a pleasure to write this guide and I wish you a good journey!

Beth Ponte

Intro

# About this Guide

This guide shares resources – toolkits, reports, studies, tools, videos and online courses – to help arts organisations to develop Quality Management practices in their own pace and format, using ISO’s seven Quality Management Principles as a framework. This resource guide aims to bring Quality Management as a topic and practice to the sector, while shedding light on the amazing collection of knowledge on arts management produced recently and available online.

Intro

Through extensive research, 180 resources from 13 countries were selected. Almost all of them were made from and to the arts management field – with few exceptions coming from the charitable sector and even fewer from the private. The diversity and wide range of resources is an undeniable proof of the development of arts management as an autonomous and flourishing sector, able to produce its own knowledge rather than simply importing management theories and practices from the private sector.

**The ISO’s Quality Management Principles are presented here as a framework to address quality as a holistic process.** The use of this set of principles – the same used in any other industry – to talk about quality management for cultural organisations aims to tackle two resistant misconceptions: that it is not feasible for arts organisations and that quality management can only be achieved through a long and complicated list of standards.

Throughout this guide, you will meet some **recurring topics**, such as: **Sustainability** (in its three main pillars: Economic, Environmental, and Social);

**Change** (related to management or digital transformation); **Ethics** (for collaborations, fundraising or work practices), and **Diversity** (among leaders, teams and audiences). The strong presence of these themes shows how they permeate arts management and its institutions and have always to be on our sight. Quality management is after all a way of thinking (and acting).

**This guide focuses on online and free resources.** As this very publication, they were created to be shared with the wide arts management community – practitioners, researchers, students, consultants and public agents. This guide is not an academic publication and was not meant to be one. Despite of it, the rigor with the sources and respect to the authors was kept as a principle during the research. As another sign of arts management development as a professional field, there are also several books or academic publications – online or printed - that were not targeted in this guide. It is recommended that you look for these other publications if you want to dig in any specific subject.

# Who is this guide for?

This guide is made for anyone working or involved in the daily challenges of managing arts institutions, policies and projects in any scale. Cultural leaders (at any hierarchical level), board members, consultants, policy makers and other practitioners interested in (or even afraid of) quality management for culture will find inspiration and best practices to apply in their own institutions. Although this is not an academic research, this guide also offers valuable information and content for professors, researchers and students in the cultural field.

Intro

# How to use it?

To facilitate their identification, the resources were organized according to their relationship with each Quality Management Principle and under the following categories and respective icons:

-  Research Report/ Study
-  Toolkits or Tools
-  Website
-  Online Course
-  Book
-  Video

This guide was meant to be your “quality management companion”. You can use it as your own personal and digital library/knowledge hub on arts management. You can read it at once or just check specific parts of it depending on your interests.

All the links will connect you directly with the resources, hosted in the official webpages of the institutions who produced them. Some of them offer just an introduction to certain topics on arts management; some are meant for senior managers and established organisations. Feel free to explore and use whatever feels more interesting for you and your organisation. Just choose a topic in the summary and click on it. Go back to the summary whenever you want to. Save this guide in your computer and go back to it whenever you need inspiration or solutions for your current challenges.

If you are reading this guide a few or maybe many years after its publication, some of the resources may not be available on the same link anymore. If you don't find them online, try to contact the authors or write to [info@qualityforculture.org](mailto:info@qualityforculture.org) and we will try to help you to have access to it.

Despite most of the content presented here has no expiration time, it is likely that new resources have been produced and published on the topics covered in this guide. You can use it then as a starting point for your own exploration and curation.

If you want to know more about quality standards, quality management systems and accreditation schemes for the cultural sector check also the *Quality for Culture: White Paper* [www.qualityforculture.org](http://www.qualityforculture.org).

# Hacking the system: Quality Management Principles through cultural lenses

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# Quality Management Principles

You may not be familiar with Quality Management (QM) standards or systems, but for sure you have heard about the ISO 9001 certification. Introduced in 1987, it is the most famous international standard specifying requirements for quality management.

The current version of the standard was released in September 2015 and nowadays there are more than one million companies and organisations, from a wide range of sectors in over 170 countries certified to ISO 9001. No wonder the certification became a synonym of quality management and has been used for companies in every economic sector as a strategy for organisational development, service improvement and also to communicate trust, accountability and professionalism to their customers and stakeholders.

Quality Management is not restricted to the realm of private companies and corporates. Recently, cultural institutions have also developed an increasing interest in QM approaches, standards and systems (to know more about it, check our [Quality for Culture: White Paper](#)). Still, the topic raises resistance among cultural leaders and is surrounded by controversy and lack of knowledge.

The practice of quality management is unique to every organisation. There are no magic formulas or “one size fits all” approaches. And this is why this guide introduces the topic of Quality Manage-

ment for Cultural Organisations not focusing on the ISO 9001 adoption per se, but on the principles that serve as basis for quality management.

Principles should be “intended as guidelines rather than regulations, to meet practitioners aspirations to do their best and not just to regularize their work” (Schwarz. M, 2014). Therefore, Quality Management principles are a set of fundamental beliefs, norms and values that are accepted as true and can be used as a basis for quality management. In the free publication [Quality Management Principles](#) ISO presents the seven principles that serve as foundation for ISO 9000, ISO 9001 and related quality management standards.

# Quality Management Principles

The ISO's Quality Management Principles are:

## QMP 1 Customer focus

## QMP 2 Leadership

## QMP 3 Engagement of people

## QMP 4 Process approach

## QMP 5 Improvement

## QMP 6 Evidence-based decision making

## QMP 7 Relationship management

In order to help arts organisations to develop or improve their Quality Management practices, this guide introduces each principle – through a statement, the same description used by ISO – and presents a list of curated arts management resources related to key topics in each of them. The principles and the topics were chosen as a classification strategy to facilitate the presentation of resources and the understanding of quality as a process.

Important to note that these principles are not listed in order of priority. The importance of each principle will vary from organisation to organisation and can also be expected to change over time. While exploring the resources, you will probably notice that there are internal connections between them and that many resources can be related to more than one principle. It shows that no principle is a silo and that quality must permeate all the activities and areas of an organisation.

The use of ISO's quality management principles as framework in this guide should not be seen as

a “clash between two worlds”, but as a chance for mutual development. As this rich collection of resources shows, the cultural sector is far more advanced in strategies and practices related to some principles than the private sector. In the current times when resilience, creativity, innovation and social impact are ubiquitous concepts, the private sector may have more to learn with cultural organisations than the opposite.

Finally, after reading this guide, you will realize that many arts organisations already apply the quality management principles and practices without knowing it. For some organisations, this guide can serve as an incentive to create their own Quality Management Systems or to achieve their Quality Management certifications. And for all the others, this guide can serve as an invitation to “hack the Quality Management System” in order to improve their work and keep simply doing better in their own way.

# Where to begin

In this initial section, we selected some resources and tools to help you to assess and improve your **governance**, (re)think your **business model and strategic planning**, be aware of your **financial health** and develop **fundraising** strategies, and deal with **change** in your organisation.

Quality Management must be a continuous and holistic process. But where to begin? The quality management principles are not a recipe and can be addressed in different ways to help organisations to develop new practices or to solve current challenges. But it can be less effective, for instance, to focus on processes approaches (QMP 4) if your organisation has not yet established good governance practices or is still struggling to find ways to finance its activities.

This is why this guide starts with a selection of resources in order to help you to analyze the current situation of your organisation and to offer you inspiration to improve some of the basic management areas before focusing on other aspects of quality management.

*“If quality can only be planned for and ‘built in’ early in the process, the only feasible way to manage quality is to focus attention on fulfilling the conditions required for quality to occur.”*

- Rachel Blanche, 2014

## Governance



The publication **Essential governance practices for arts organisations**, developed by **Australia Council for the Arts**, summarizes key principles and best practice guidelines to assist boards and board members of all arts organisations to ensure they meet their legal obligations.



**A Practical Guide to Governance**, developed by **Clore Leadership** and the **Cultural Governance Alliance**, offers a range of essential information, bespoke resources and downloadable templates for effective governance of cultural organisations.



The Developing Governance Group (DGG) has produced the **Code of Good Governance** that sets out principles and key elements of good governance for the boards of voluntary and community organisations. Their website offers a governance health check and many online resources mapped, with a special section about Financial and Management Controls.

## GIFE's Governance resources (Brazil)



Prepared by **GIFE** and the **Brazilian Institute of Corporate Governance (IBGC)**, the **Guide to Best Governance Practices for Business Institutes and Foundations** (2014) is an important tool to help civil society organisations conducting effective and positive changes in their Governance processes.



The **GIFE Governance Indicators** allows associations and foundations to assess for themselves their degree of governance development. The self-assessment is performed by completing an online questionnaire structured on a set of indicators that provides a total score and can better outline the ways to improve the governance of the organisation.

## Strategic & Business Planning



**To sell or not to sell? An introduction to business models (innovation) for arts and cultural organisations** (2016), a **IETM Toolkit** by José Rodríguez that aims to clarify the key concepts related to business models and proposes a tailored canvas for arts and cultural organisations.



**Business planning guidance for arts and cultural organisations**, developed by Dawn Langley and Susan Royce for **Arts Council England**, is a useful tool to help communicate your ambitions to both your staff and supporters, helping to secure commitment to common goals internally and retaining and attracting resources from outside.



**Arts Management in Turbulent Times - Adaptable Quality Management**, from Milena Dragicevic Šesic and Sanjin Dragojevic, is a practical guide on Arts Management for regions in transition. Published in 2005, it is an important source for arts managers, cultural operators, cultural policy makers and others working in the field.



The **NCVO (The National Council for Voluntary Organisations)** offers a wide set of tools and resources about strategy development process for nonprofits that can be also applied to cultural organisations' planning.



The **Culture and Creativity website** was created in 2015 within the framework of an EU Program aiming to promote cultural contribution to the social and economic development of Eastern European countries. They offer free online courses like **The Cultural Strategy** and **The Strategic Planning**, in which international cultural experts share their experience in short lectures.



**The Cycle: Management of Successful Arts and Cultural Organisations**, a free online course offered by the **DeVos Institute of Arts Management at the University of Maryland**, presents a management theory created by Michael Kaiser. It explains how great art and strong marketing can create a family of supporters and help to produce the revenue required to support the arts organisations continuously.

## Finance Management & Fundraising



Pro Active Resolutions produced a short **Financial Awareness Guide** to provide an initial framework of understanding about the accounting for arts organisations. The principles and comments within the guide are a good starting point for anyone new to financial statements and balance sheets.



**Learning from the Community: Effective Financial Management Practices in the Arts** (2003) is a publication of Jim Rosenberg for **National Arts Strategies (NAS)**. With funding from The James Irvine Foundation, he interviewed arts leaders to understand how effective financial management practices at leading organisations might be used across the sector. This study introduces the financial management practices and provides a framework that arts organisations can use to start evaluating their own approaches to financial management.

*“The traditional conflict between ‘artistic mission’ and ‘financial objectives’ creates a culture that misses opportunities to improve both financial and artistic performance.”*

– Jim Rosenberg,  
*Learning from the Community, 2003*

## Resources



If your organisation is new to fundraising, we recommend [\*\*The Art of Giving: Fundraising For The Arts Toolkit\*\*](#) produced by [\*\*Singapore's National Arts Council\*\*](#). This toolkit presents tips for preparation, implementation, and assessment of fundraising strategies.



[\*\*Effective Fundraising and Leadership in Arts and Culture\*\*](#) is a free online course developed by the University of Leeds and promoted by [\*\*Cause4\*\*](#) and [\*\*Arts and Marketing Association\*\*](#). The course focuses on the importance of developing organisational resilience through effective leadership and management, and on how to diversify income streams by becoming more entrepreneurial. You will also have access to different leadership styles and content on change management and entrepreneurship.



[\*\*Inspiring Fundraising\*\*](#) is an online resource created as result of the four-year [\*\*Resourcing Scotland's Heritage\*\*](#) partnership program, led by [\*\*Arts & Business Scotland\*\*](#). It offers tools and

insights to help everyone in the heritage sector to raise funds for their organisation, cause or project.



[\*\*Digital Giving in the Arts – Democratising Philanthropy\*\*](#) (2012) is an independent report commissioned by the [\*\*UK's Department of State for Culture, Media and Sport\*\*](#) on the scope for harnessing digital technology to boost charitable giving to the culture and heritage sectors.



[\*\*Towards more efficient financial ecosystems: Innovative instruments to facilitate access to finance for the cultural and creative sectors \(CCS\)\*\*](#) (2016) is a good practice report produced by the European Commission. This report looks at the innovative instruments which can facilitate access to finance for the cultural and creative sectors, with 32 success stories.



[\*\*Crowdfunding: Reshaping the crowd's engagement in culture\*\*](#) (2017) is a study developed by [\*\*European Crowdfunding Network\*\*](#) for the

European Commission. The study was based on a dataset with information from nearly 75,000 crowdfunding campaigns and examines to what extent crowdfunding is being used in the cultural and creative sectors (CCS) in Europe.

## Change Management



[\*\*Managing teams through change\*\*](#) is a guide developed by [\*\*Prosper\*\*](#) and [\*\*Culture Hive\*\*](#). Written by Alasdair Cant, it highlights the key points to consider when managing a team through organisational change – from planning and implementing change, through to dealing effectively with uncertainty to avoid resistance and conflict.



[\*\*Leading Change\*\*](#) is an online video catalogue developed by the [\*\*National Arts Strategies\*\*](#). In this special project, several arts leaders talk about the challenges and strategies for leading change in arts organisations.

# QMP's

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# 1

# Customer Focus

QMP's

The primary focus of quality management is to meet customer requirements and to strive to exceed customer expectations.

What the private sector calls customer – groups of people that a given organisation aims to reach and serve – has a broader definition through cultural lenses. Feel free to replace the word “customer” for “beneficiaries” or for the term that better fits to your organisation’s activities: audience, visitor, community, users, students etc. To approach this broad topic, we selected a special set of resources addressing some issues like **audience development, community building, young (and old) audiences, and access for audiences (and artists) with disabilities**. You will find reports, toolkits, guides and special checklists.

QMP's



## Audience Development

Knowing and exploring your audiences



Created by [Creative Victoria](#) the [Audience Research Toolkit](#) is a comprehensive set of tools for beginners and allows you to find tools that match your resources and skill level.



[Audience Explorations: Guidebook for hopefully seeking the audience](#) (2016), a [IETM](#) toolkit by Goran Tomka, presents a set of 'tools', exercises and suggestions to lead an autonomous exploration of your own (potential) audiences and to better connect with them, according to your own mission and values.



[Creating an Effective Audience Development Plan](#) is an useful and introductory guide to Audience Development Planning developed by [The Audience Agency](#). They have also developed a good [practice guide to audience development for touring organisations](#).



[Knowing and Growing your Audience](#) (2018) is a [Prosper](#) and [Culture Hive](#) resource developed by Julie Aldridge. It introduces strategic approaches that you might adopt to start to know and grow your audience.

Expanding and diversifying your audiences



[The Road to Results: Effective Practices for Building Arts Audiences](#) (2014) by Bob Harlow for [Wallace Foundation](#) identifies and examines nine practices of arts organisations that successfully expanded their audiences.



[Audience Development: How to place audiences at the centre of cultural organisations](#) (2017) is a study commissioned by the European Commission. It provides successful approaches and methods to equip cultural leaders to make a transition towards a more audiencecentric organisation.



[Imagining Arts Organisations for New Audiences](#) (2015) presents ways to develop new audiences for a variety of cultural organisations and art forms through sustainable audience-building strategies. It was written by Annabel Jackson for the [Cleveland Foundation](#) and the [Paul Hamlyn Foundation](#).



[Connecting:// arts audiences online](#) (2010), from [Australia Council for the Arts](#), investigates how arts organisations can use the internet to build audience engagement and enhance their online presence.



Check the [lectures about Audience Development](#) with several arts managers on the "[MOOC \(Massive Open Online Course\) Managing the Arts](#)", developed by the [Goethe Institute](#) and the [Leuphana University](#). They are available in English and German, with Arabic and Spanish subtitles.

*“Diverse audiences start from a culture of diversity.”*

– Donna Walker-Kuhne

V

Watch an insightful **keynote of Donna Walker-Kuhne**, author of “Invitation to the Party: Building Bridges to the Arts, Culture and Community” (2005), promoted by **Arts Wave** in 2016.

R

**Navigating difference: cultural diversity and audience development** (2013), commissioned by **Arts Council England**, offers a comprehensive set of articles about cultural diversity, with examples of good practices and practical advice for marketing, management and audience development.

→ If you are interested in diversity among leadership and teams, you can find specific resources on **QMP2: Leadership** and on **QMP3: Engagement of People**

## Community Building & Participatory Arts

*“It should also be acknowledged that arts and cultural organisations often deliver services and activities which benefit the community in which they are based. So, according to the specific case of each organisation, the concept of ‘audiences’ can be considered in its larger sense, as including actual and possible audiences; or even be coupled with the terms ‘communities’ and ‘mutual exchange’.”*

– José Rodriguez,  
To Sell or Not To Sell? IETM Toolkit, 2016

T

**Creative Exchange** is the national program of Springboard for the Arts, an artist-led nonprofit based in Minnesota. They offer a **series of toolkits on Community Engagement** helping to create events and programming to bring people together, share authentic narratives, and imagine new possibilities.

T

**Imagine, define, design: Planning & Designing Arts-Based Civic Engagement Projects** is a toolkit designed by **American for the Arts** to help both arts and community organizers and artists plan effective and meaningful arts-based civic engagement or dialogue projects.

R

**Developing a Foundation for Quality Guidance: for arts organisations and artists in Scotland working in participatory settings** (2014) was commissioned by **Creative Scotland** and developed by Rachel Blanche. It maps out in some detail the nine quality principles that emerged from 30 different frameworks and studies and offers interesting inputs for organisations that have participatory work as their mission.

## Young & Aging Audiences

**R** **Arts Council England** and cultural organisations that work with children and young people developed between 2014 – 2015 a set of **Seven Quality Principles for arts and culture for, by, and with children and young people**. These principles can help organisations involved in delivering artistic, cultural and creative projects for or with children and young people to plan and evaluate their projects.

**R** **Creating Safety**, produced in partnership between **Creative Scotland** and **Children in Scotland**, provides guidance on child protection and safeguarding for cultural organisations. It also offers practical guidance on delicate topics, such as how to deal with disclosures and suspicious of abuse and tips on staff and volunteers' behaviour.

**R** **Children in Museums: Investing in the audience of the future** (2011), developed by **Netherlands Museums Association**, offers practical suggestions to help museums to attract more young visitors.

**R** If you want to know what museums can do for the ageing population you can find inspiration in the report **The UK's Ageing Population: Challenges and Opportunities for Museums and Galleries**, produced by the **British Museum** and the **University of Oxford's Institute of Population Ageing**.

## Accessibility & Disabilities

**T** **Breaking down Barriers**, a guide developed by **Voluntary Arts**, identifies a range of barriers for audiences, including those relating to cost, travel, disability, lack of information or motivation. It offers plenty of suitable tips to tackle these barriers and make changes to internal processes, decision making and marketing to make cultural events as welcoming and inclusive as possible.

**W T** Voluntary Arts also developed, with the support of **Euan's Guide**, an **Events checklist – disability and access** with information on different disability and access requirements, practical guidance on how to remove barriers and a handy events checklist.

**T** **Disability Toolkit for Museums**, compiled by Michèle Taylor for **Cultural Heritage Without Borders** offers tools and tips to make museums more accessible and welcoming to disabled people.

**R** The **Manual Innovation Diversity – New Approaches of Cultural Encounter in Europe** was created as part of the international project **Un-Label – New Grounds for Inclusive Performing Arts**. The manual shows how to reduce barriers and provides a checklist for planning and implementing your own projects as well as an overview of important inclusive cultural operators and experts across Europe.

# 2

# Leadership

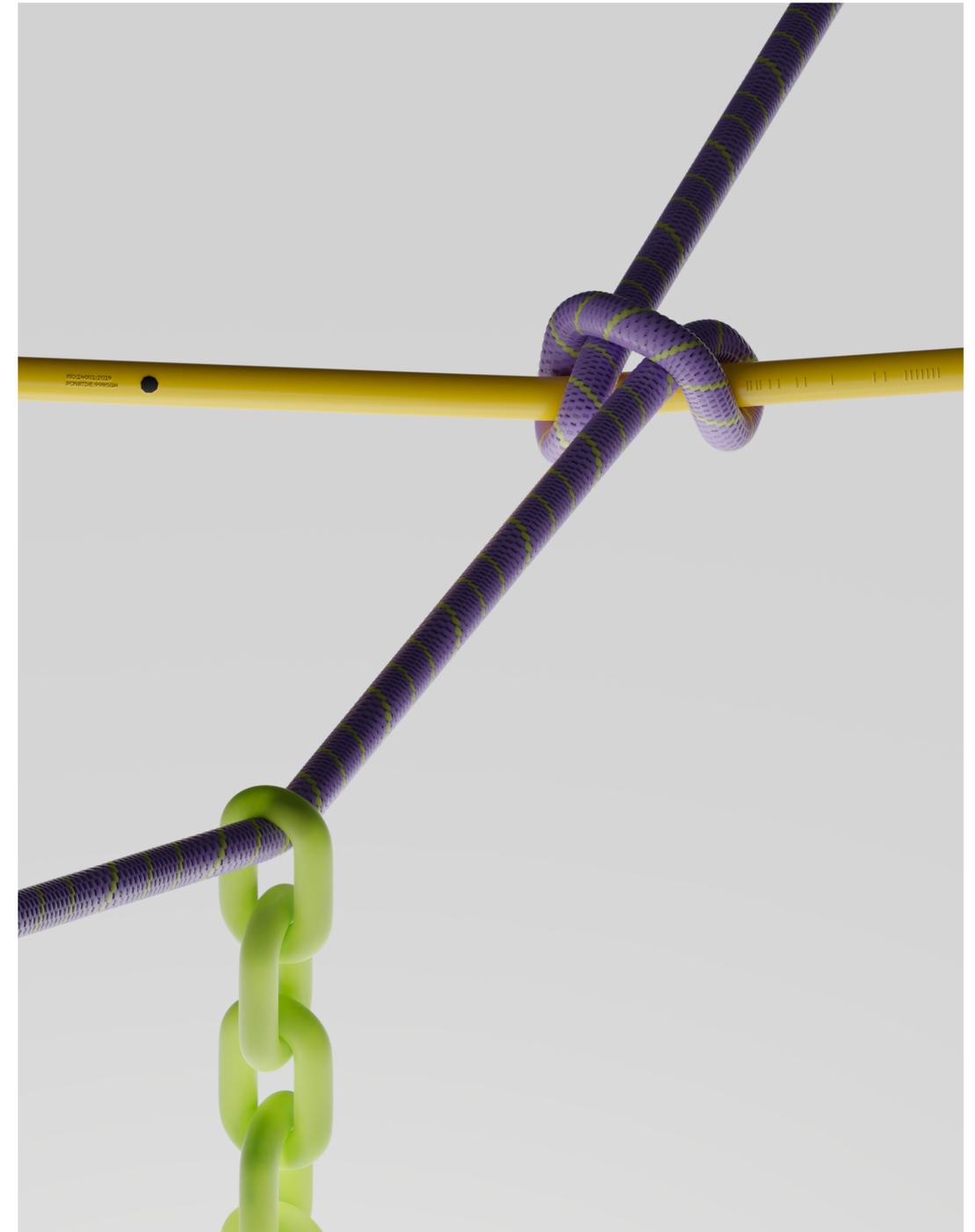
QMP's

Leaders at all levels establish unity of purpose and direction and create conditions in which people are engaged in achieving the organisation's quality objectives.

*“Cultural leadership is the act of leading the cultural sector. Like culture itself, it comes from many different people and can be practiced in many different ways. It concerns senior managers and directors in subsidized cultural institutions; public officials developing and implementing policy for the cultural sector; and a huge range of producers, innovators and entrepreneurs in small companies, production houses and teams. In the cultural world, nobody has a monopoly on leadership.”*

– **British Council (2009) What is Cultural Leadership?**

In this section you will find resources to help you understand what cultural leadership is about and what the new ways of leading culture can teach to other sectors and industries. You will also have access to resources about diversity in leadership and inspiring stories from cultural leaders worldwide.



## Cultural Leadership - General Understanding

**R** **Changing cultures: Transforming leadership in the arts, museums and libraries** (2018), a **King's College** research commissioned by **Arts Council England**, presents skills, attributes and behaviours for future-facing leadership and sheds light on the changing environment of leadership in the cultural sector.

**B** One of the valued contributions of the **Cultural Leadership Programme**, developed in UK between 2006 - 2011, was the range of reports it commissioned on development priority areas such as diversity and governance. **A Cultural Leadership Reader**, edited by Sue Kay and Katie Venner, is a good companion on the cultural leadership journey.

**B** **Perspectives on Cultural Leadership** (2016), organized by Dalborg, K. & Löfgren, M and developed by **The FIKA Project**, is an anthology of research and essays, offering thought-provoking perspectives on some of the waters that cultural leaders these days are obliged to navigate.

**R** **D'Art 52: Cultural Leadership in the 21st Century** (2017) is a revised edition of the Discussion Paper for the 7th World Summit on Arts & Culture of the **International Federation of Arts Councils and Culture Agencies (IFACCA)** and offers perspectives on cultural leadership in the five continents.

**R** Jon Price's article **The Construction of Cultural Leadership** (2017) for **ENCATC's Journal of Cultural Management and Policy** reviews the evolution of cultural leadership as a discursive construct, drawing on a decade's research.

## Distributed Leadership

Distributed leadership is a framework for understanding how the work of leadership is shared within complex organisations. Rather than focus on characteristics of the individual leader (heroic leadership), distributed leadership focuses on leadership as a process that can be shared across the organisation.

*"Leadership is no longer the task of one lone or some few individuals, but it becomes an emerging phenomenon through the interconnected practices of people within and outside the organisation."*

- [Johan Kolsteeg and Martin Zierold, Mapping the meanings of Cultural Leadership, 2019](#)

## Leading from any chair: The conductorless orchestra

**Orpheus Chamber Orchestra** is an orchestra with a difference: it has no conductor. But it does not mean they are leaderless. The group was founded in 1972 by the cellist Julian Fifer and a small group of like-minded musicians with the goal of bringing the chamber music ideals of democracy, personal involvement, and mutual respect into an orchestral setting. Working together as a collective of leaders, members explore each other's musical ideas using their signature collaborative method, the Orpheus Process®. In order to share their methodology, they have created the Orpheus Leadership Institute, a customizable engagement program for corporations and educational institutions that shows teams how to maximize their potential.

## Principles of Orpheus Leadership

- ① Put power in the hands of the people doing the work.
- ② Encourage individual responsibility for product and quality.
- ③ Create clarity of roles.
- ④ Foster horizontal teamwork.
- ⑤ Share and rotate leadership.
- ⑥ Learn to listen, learn to talk.
- ⑦ Seek consensus (and build creative systems that favor consensus).
- ⑧ Dedicate passionately to your mission.

R

The **William and Flora Hewlett Foundation** commissioned a **set of case studies in distributed leadership** (2018), examining how some arts and nonprofit institutions are incorporating distributed leadership into their organisational structure and practices.

T

Take this **Distributed Leadership Quiz**, also created by the Hewlett Foundation, and discover how your organisations is sharing responsibility and authority.

## Leadership & Diversity

T

**Role Models and Leaders in the Performing Arts: How to find one, be one and make a difference** is a Pocket Guide, developed by Maya Productions and based on a **Clore Leadership** and **Arts and Humanities Research Council (AHRC)** research project. It shows how Black, Asian and Minority Ethnic (BAME) role models can help challenge and change the status quo and how to seek out role models and learn from them.

W

The **Gender Equity in Museums Movement** (GEMM) is a coalition of individuals and organisations committed to raising awareness, affecting change, and championing transparency about gender equity in the museum workplace.

R

The **Gender Gap Reports** were developed by the **Association of Art Museums Directors (AAMD)** and the **National Center for Arts Research (NCAR)** in 2014 and 2017. They found that a gender gap persists in art museum directorships in US. Women held less than half of directorships, the average female director's salary lagged behind that of the average male director, and these phenomena are most persistent in the largest museums.

R

**Moving Arts Leadership Forward: A Changing Landscape**, for the **William and Flora Hewlett Foundation**, shows how different generations experience their work in the arts sector, and highlights how age difference affects engagement, innovation, and other factors critical to

the success of individual arts organisations and the health of the field as a whole.

## Leader's Narratives

B

**Narratives by Cultural Change Makers (2016)**, developed by **The FIKA Project**, consists of interviews with ten prominent cultural leaders from different parts of the world. Active in different countries, in different types of organisations and with different art forms and types of culture, they tell us about life and work, education and training, professional experiences, success and setbacks, dilemmas and solutions.

B

A **Trans Europe Halles** production, **Leaders' Stories: Conversations with Leaders in the European Independent Cultural Sector**, organized by José Luis Rodríguez and Ludvig Duregård, brings together the leadership and personal experiences of eleven leaders working in European independent cultural centers.

*"If we want to build organisations that can innovate time and again we must unlearn our conventional notions of leadership."*

– Linda Hill

V

Check the **TED TALK: How to manage for collective creativity?** of Harvard's professor Linda Hill. For a decade, she has studied some of the world's most creative companies to come up with a set of tools and tactics to keep great ideas flowing – from everyone in the company, not just the designated "creatives".

# 3

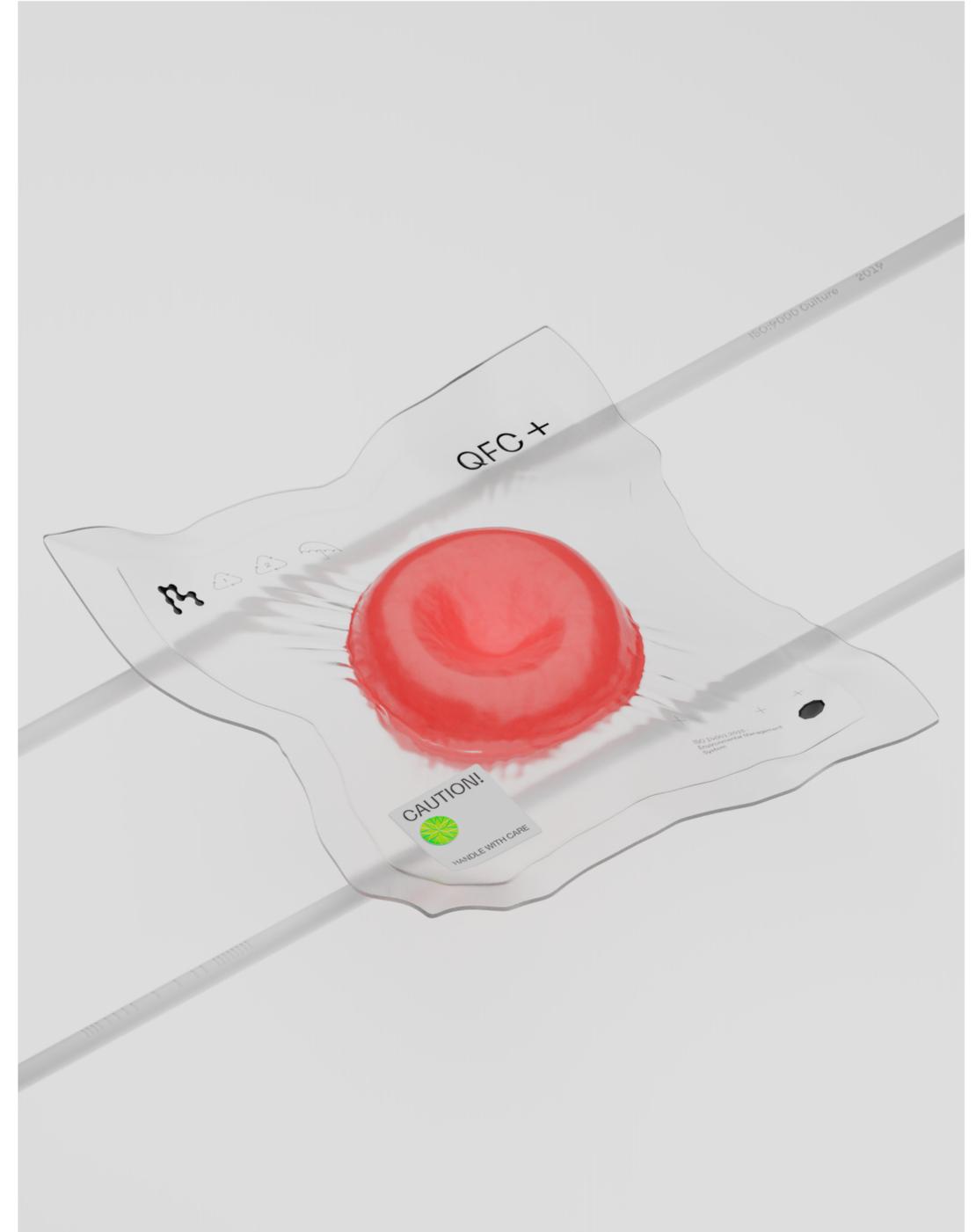
# People Engagement

QMP's

Competent, empowered and engaged people at all levels throughout the organisation are essential to enhance its capability to create and deliver value.

Regardless of the size of your organisation or cultural enterprise, people are your most precious asset and will always be central for delivering your mission. In this section, you will find a group of selected resources about HR and **team's management, innovative work practices, key skills for arts professionals**, tools and study cases about **diversity inside organisations** and the importance of awareness and fight against **bullying and sexual harassment in the cultural sector**.

QMP's



The **Performing Arts Blueprint**, developed by Creative & Cultural Skills in 2010, highlights key challenges for the performing arts workforce. Many of these issues are shared across the creative and cultural sectors.

QMP's

### Entry to the sector:

Performing arts businesses need to attract the most talented and best-trained new recruits from the widest range of backgrounds.

### Diversity:

The performing arts workforce lacks diversity, and the way that entry and recruitment is currently organised perpetuates the situation.

### Continuing Professional Development:

Most performing arts businesses are small, and many people work in the sector on a self-employed basis.

### Management and leadership:

Many performing arts organisations are led by outstandingly creative individuals whose expertise is primarily artistic; it is easy to overlook the fact that successful organisations need dynamic leadership in all aspects of business development.

### Qualification reform:

There are many popular qualifications in the performing arts sector, but, although of interest to learners, these are usually too general to prepare students for specific jobs.

### Business and enterprise:

Most senior managers in the performing arts still come from the creative areas rather than from the business. For any small business, as many in the performing arts sector are, an enterprising culture is vital to survival.

## Human Resources & Team's Management Tools



The **NCVO (The National Council for Voluntary Organisations)**, from England, and the **Neighbourhood Arts Network**, a strategic initiative of Toronto Arts Foundation, offer in their websites a wide series of tools and pieces of guidance about basic HR practices for non-profit and cultural organisations, covering topics such as delegation of tasks and projects, recruiting and managing volunteers, managing and motivating staff, building teams, and more.



Offered by the Ross School of Business at the University of Michigan in collaboration with **National Arts Strategies**, the free online course **Inspiring and Motivating Arts and Culture Teams** aims to equip leaders in the cultural sector with the critical skills for inspiring employee engagement and performance while motivating people to adjust behaviour and embrace change.

## Skill Gap, Skill Shortage and their consequences

**Skills gaps are skills that existing staff need but lack**, as opposed to skills shortages, which mean that employers cannot find job applicants with the right skills. **The effects of skills shortages and skills gaps are different.**

The impact of a skills shortage is an increased workload for everyone else in the business, and missed opportunities to take on new business, causing business to be turned away. Skills gaps, on the other hand, can lead to existing business being lost through poor delivery or impossible pressure on the workforce.

**(Creative & Cultural Skills, The Performing Arts Blueprint, 2010)**

## New work practices & skills



**Everyday Innovators** is a free publication commissioned by **IETM** that brings up practical examples of innovative work organisation practices in the cultural sector in Europe.



From December 2016 to March 2017 the **Mu.SA - Museum Sector Skills Alliance project** carried out a mapping of professional competences, digital and transferable, with the involvement of 81 experts in Europe, ranging from museum directors to policy makers, researchers, freelancers, etc. In their website you can find the reports **Museum Professionals in the Digital Era – Agents of Change and Innovation** and **Emerging Job Profiles for museum professionals**.

*“Employers don’t just value creativity alone: they need talent with project management and organisational skills too. The analysis suggests that strong project management and organisational skills, when combined with creativity, will be a particularly potent mix in the future.”*

R

- [Creativity and the future of skills](#), by [Creative Industries Policy and Evidence Centre \(PEC\)](#) and [NESTA](#).

## Diversity in workplace

T

The [Culture Change Guide](#) by [Arts Council England](#) contains case studies and best practice examples from the arts and culture sector and beyond, with guidance on how to recruit and support diverse talent in an organisation, and how to capture and use diversity data.

T

Though meant for museum’s sector, the [Diversify toolkit](#) developed by [Museums Association](#) offers practical guidance and advice for employers in the cultural sector on introducing positive action schemes and creating a diverse workforce.

T

The toolkit [Socio-Economic Diversity and Inclusion in the Arts: A Toolkit for Employers](#), produced by [Jerwood Arts](#) aims to tackle the ‘class crisis’ in arts sector.

*“The case for change is often made in terms of fairness: an arts sector that recruits and promotes according to a narrow social background is unjust in principle.”*

- [Jerwood Arts](#)

## Sexual Harassment & Bullying

We need to talk about sexual harassment and bullying in the arts

**Bullying** can be described as repeated inappropriate behaviour that undermines your right to dignity at work. It can be done by one or more persons and can be aimed at an individual or a group to make them feel inferior to other people. It can include; the consistent criticism of a competent worker, shouting at workers, people being publicly or privately belittled, unreasonable work demands or setting someone up to fail. **Sexual harassment** is any form of unwanted verbal, non-verbal or physical conduct of a sexual nature.



According to the report **Creating Without Conflict**, published in 2013 by the UK's Federation of Entertainment Unions, the creatives industries are "hotspots" for bullying: 56% of survey's respondents said they had been bullied, harassed or discriminated against at work.

In 2017 the **Arts Professional** portal published the **Pulse Report** with results of an online survey responded by more than 800 professionals in UK arts institutions: 80% of respondents to the survey were aware of sexual harassment having taken place in arts and cultural workplaces and 48% of them indicated that they had personally been subjected to sexual harassment.



**Amplify Women**, an umbrella group that represents, works with or carries out research about women working in the cultural and media industries, has produced a **toolkit for dealing with harassment and bullying in the workplace**.



**HR for the Arts (US)** offers **Basic information on sexual harassment at work** for employees and professionals that may be facing sexual harassment at work.



The **Royal Court Theatre** in London issued a **Code of behaviour preventing sexual harassment and abuse of power** that can inspire other organisations.



The **Media Entertainment & Arts Alliance (MEEA)** from Australia published in 2018 the Australian **Live Performance Industry Code of Practice to Prevent Workplace Discrimination, Harassment, Sexual Harassment and Bullying**, a comprehensive document with key concepts, best practice templates and resources.



**Workplace bullying in the arts: when creative becomes coercive** (2007) is an original research from Anne-Marie Quigg with employees at every level within both commercial and subsidised performing arts organisations in England, Scotland and Northern Ireland. It demonstrates that bullying in UK performing arts organisations is common and increasing in frequency: it is damaging, oppressive and unacceptable.

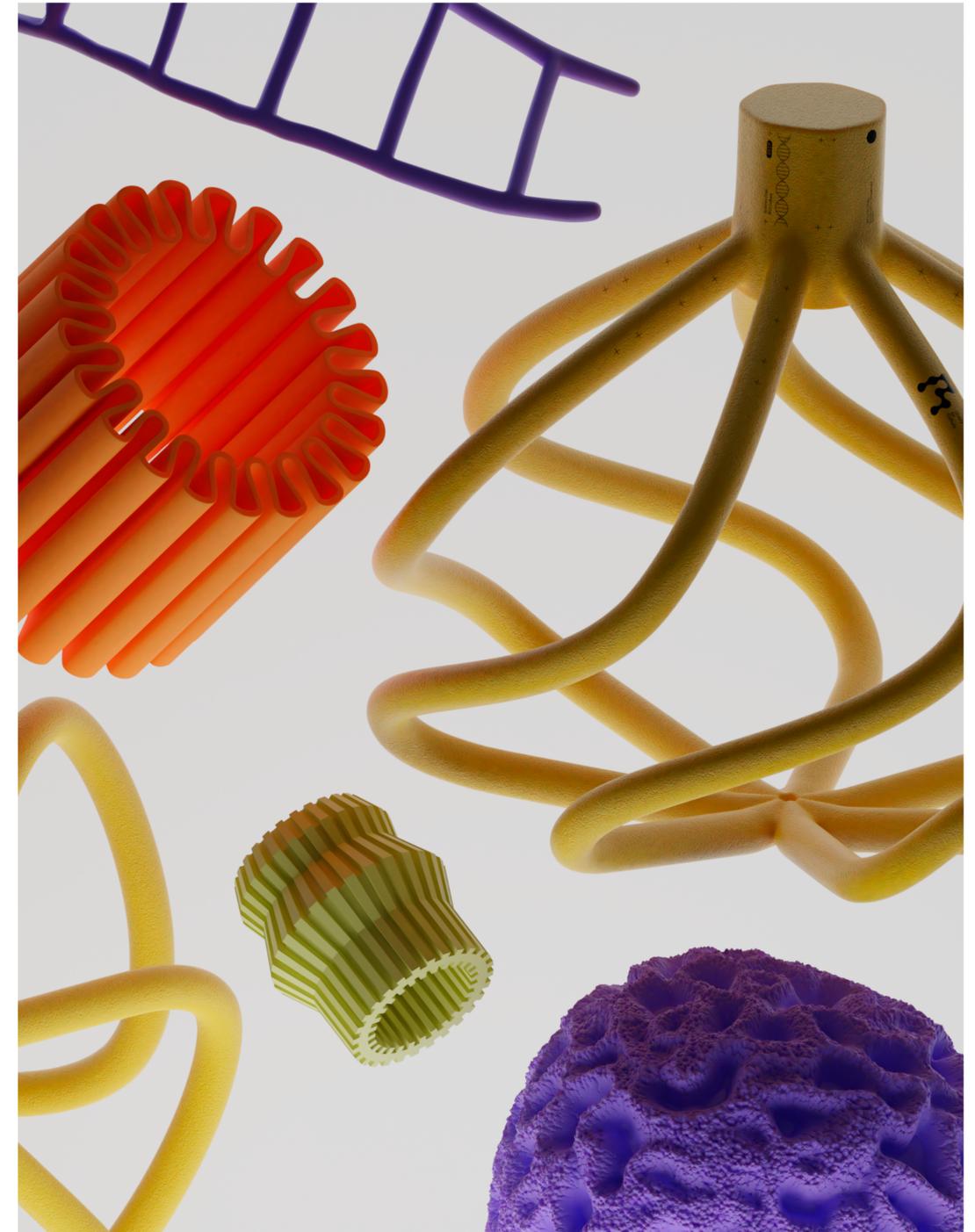
# Process Approach

QMP's

Consistent and predictable results are achieved more effectively and efficiently when activities are understood and managed as interrelated processes that function as a coherent system.

Organisations are like living organisms. They rely on a precise and synchronized work of its own systems and can also be affected by external conditions. Just like a body, the healthier the organisation is, more resistant it can be against crisis and changes in their leadership or in their environment. A “process approach” means that the whole organisation has a clear comprehension of how its organism works, is aware of its core activities and that everyone knows their role to achieve organisation’s mission. It also means that the organisation documents its main processes and procedures, defines responsibilities, facilitates the workflows and shares knowledge among its teams. Just like every live being, every organisation is unique and functions with its specificities. Therefore, it has its own way to apply its process approach. In this section, you will find basic resources on **Agile Management & Design Thinking**, a **prototype of cultural organisation’s process map** and tools to introduce **Knowledge Management** practices in your organisation.

QMP's



*“A theatre, museum, festival, concert hall or other cultural institution consists of many departments that interlock like the cogs of a clockwork. Cultural institutions are highly complex systems, which have to operate under an enormous pressure.”*

- Knava, I. & Heskia, T.,  
ISO from Culture, p. 148

QMP's

## Organisational Processes Map

An organisational process map is a diagram, a tool that presents in a clear and visual format all the main activities carried by the organisation. It shows the interactions between the processes and how they condition and influence each other.

The organisational processes can be classified as: leadership processes; core processes; support processes; and outsourced processes. It is important to note that this classification depends on each organisation's nature. A support process for an organisation may be a core process for other. Thinking in processes also means placing customer expectations and needs at the beginning of each process.

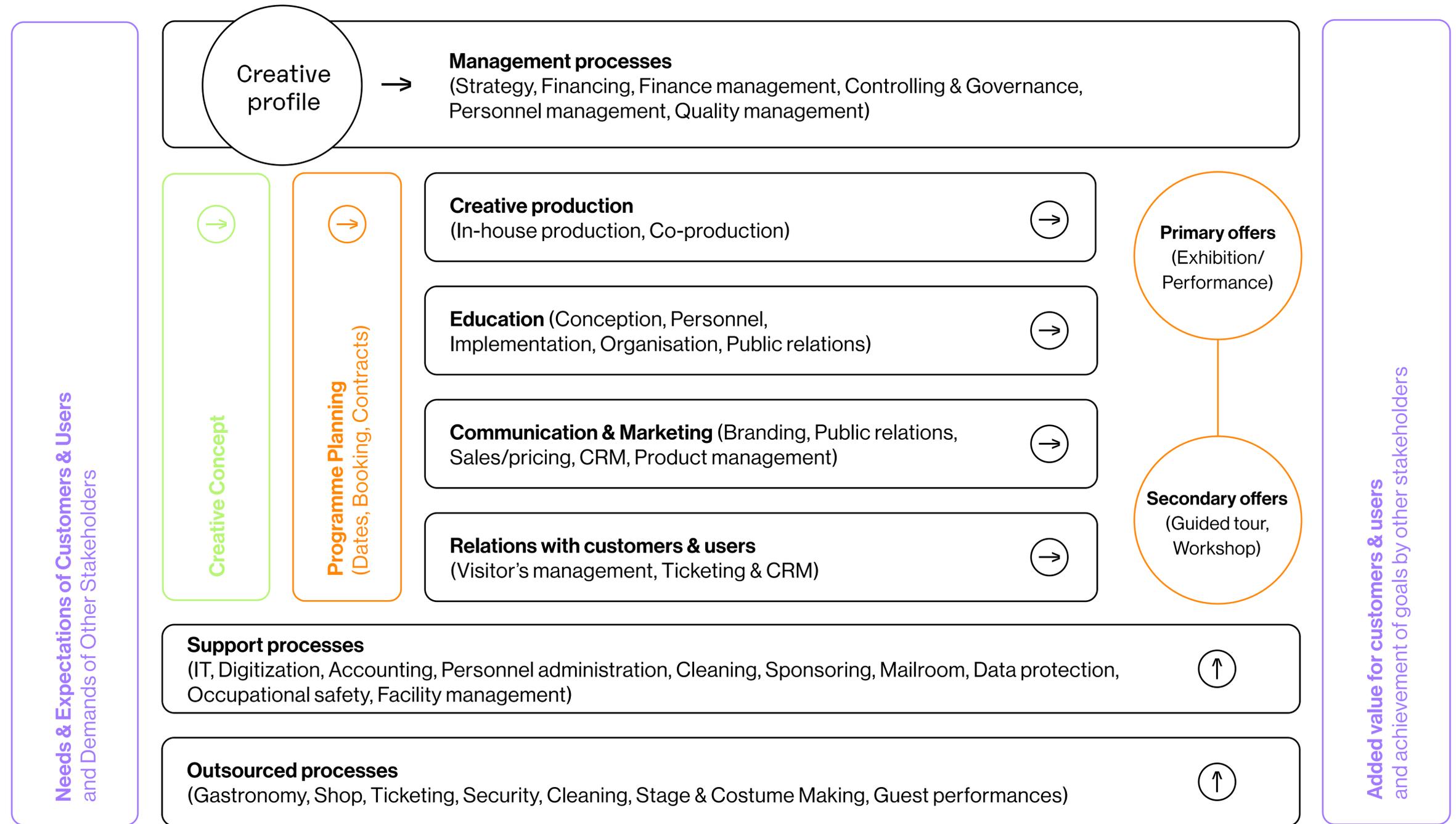


**ISO for Culture** (2016), from Irene Knava and Thomas Heskia, sheds light on the importance of process approach for cultural organisations and offers a **prototypical process map for cultural organisations** in general (with versions also for Museums and Performing Arts).

Process Groups	
Types of Processes	Questions (how to identify them)
Leadership processes	Where is leadership needed?
Core processes	How do we provide our services? How do we earn money? Where is our value added?
Support processes	How do we support our core processes?
Outsourced processes	What do we outsource to external service providers?

# Prototypical process map for cultural organisations

QMP's



## Process, procedures and work instructions

When an organisation decides to document its main processes it normally faces the questions: What should be written down? What is the difference between **processes** and **procedures**? How to present and share the processes?

The ISO 9001:2015 standard (Quality management systems – Fundamentals and vocabulary) defines the concept of Process as: **“A set of related or interacting activities, which transform inputs into outputs”**. Any activity, or set of activities, that uses resources to transform input elements into results can be considered as a process.

**Procedure is “specified way to carry out an activity or a process”**. When you have a process that must happen in a specific way, and you specify how it happens, you have a procedure. The procedures are used for those activities in which several operations are linked and different people or departments of the company are involved.

**Work Instructions are documents that clearly and precisely describe the correct way to perform certain tasks** that may cause inconvenience or damage if not done in the established manner. The work instructions are mainly focused on explaining how a specific activity is going to be carried out, and they are mandatory.

To write processes down can be a time-consuming activity. But once it is done, it will help you to save time for creative activities and for dealing properly with the problems you cannot foresee.

### Characteristics of processes

- Processes have a beginning, a content and a clear end.
- It is clearly defined from whom an “input” comes and where the “result” goes.

- There is a person (or a team) responsible for each process. Processes are organized in a way that minimize chance in the best possible way.
- All relevant processes should be transparent and accessible to every employee. Loss of knowledge in staff fluctuation is therefore minimized.
- There are clear guidelines for documentation: Who creates the process? Who approves it? In which version is the process published?
- Processes should be monitored, adapted and continuously improved. In this way, documented organisational learning takes place.



Processes and procedures can be presented as text, diagrams or check lists. If you prefer the visual presentation, check this [Easy Guide to Process Mapping](#).

## Knowledge management

**Knowledge management (KM)** is the process of creating, sharing, using and managing the knowledge and information of an organisation. It is deeply related with the success of process approaches, but it cannot be reduced only to documentation of processes and internal communication tools. KM itself can be seen as a process towards the development of a [Learning Organisation](#) that facilitates the development of its members and continuously transforms itself.

*“Especially considering the scarcity of resources, awareness must be raised regarding the costs that occur due to the loss of knowledge. Cultural institutions and their leadership can use knowledge management not only to conserve resources, for example, in avoiding the repeti-*

*tion of the same mistakes, but its concerted implementation can also improve the quality of their work and thereby realize the purpose of their organisation.”*

– Gesa Birnkraut,  
2014



KM is particularly interesting for Museums, Archives and institutions working with collections. [Sharing Knowledge: a Toolkit](#) (2011), commissioned by [Museums Association](#), is a practical guide to help collections specialists improve how they share collections knowledge and skills, to help museums address succession planning and to provide a benchmark for good practice for both organisations and practitioners.



[Knowledge Management Matters: Words of Wisdom from Leading Practitioners](#) (2018), edited by John Girard, is a collection of works by a diverse group of thought leaders.



The website [Knowledge Management Tools](#) offers a wider set of IT and non-IT tools for organisations interested in KM.

## Agile Management & Design Thinking

**Agile** is a group of methodologies used by software developers to complete projects efficiently and on time, through collaboration between self-organizing cross-functional teams. Recently, agile methodologies – which include values, principles and practices – are spreading across a broad range of industries and functions. **Design thinking** is a process for creative problem solving. It encourages organisations to focus on the people they’re creating for, which leads to better products, services, and internal processes.

## Resources

Both methods help organisations to master continuous change and their application requires a change in command-and-control-style management and in the classical and individual leadership approach. Consequently, they tend to have better results in organisations that adopt distributed leadership practices.

→ [Check more about Distributed Leadership in the \*\*QMP2 – Leadership\*\*.](#)

**T** If you are not familiar yet with Agile Management, check the article **Embracing Agile** by Darrell K. Rigby, Jeff Sutherland and Hirotaka Takeuchi for Harvard Business Review. It offers a quick introduction to agile management, with examples of some of the most widely-used Agile methodologies and access to further information through short videos and articles.

**R** To see actual examples of Agile Management in arts organisations, check the paper **The Agile museum** (2016), written by Douglas Hegley, Meaghan Tongen, and Andrew David. The paper presents the thinking and practice of these new approaches to leadership in the cultural heritage sector, using applied lessons from the Minneapolis Institute of Art (Mia).

**W** **Design Thinking for Museums** is a resource for professionals and practitioners interested in applying design thinking to museums, nonprofits, and mission-driven organisations. The site, created by Dana Mitroff Silvers, offers case studies of design thinking in action, posts by guest authors, interviews with practitioners, and resources and tools.

**T** Public Libraries in Aarhus (Denmark) and Chicago (USA), with funding from the **Bill & Melinda Gates Foundation**, created the **Design Thinking for Libraries toolkit** to introduce design thinking as a new way of working together to discover what communities want and experiment to create services, programs and processes to meet their changing needs. The toolkit is translated to many languages, including Portuguese.

# 5 Improvement

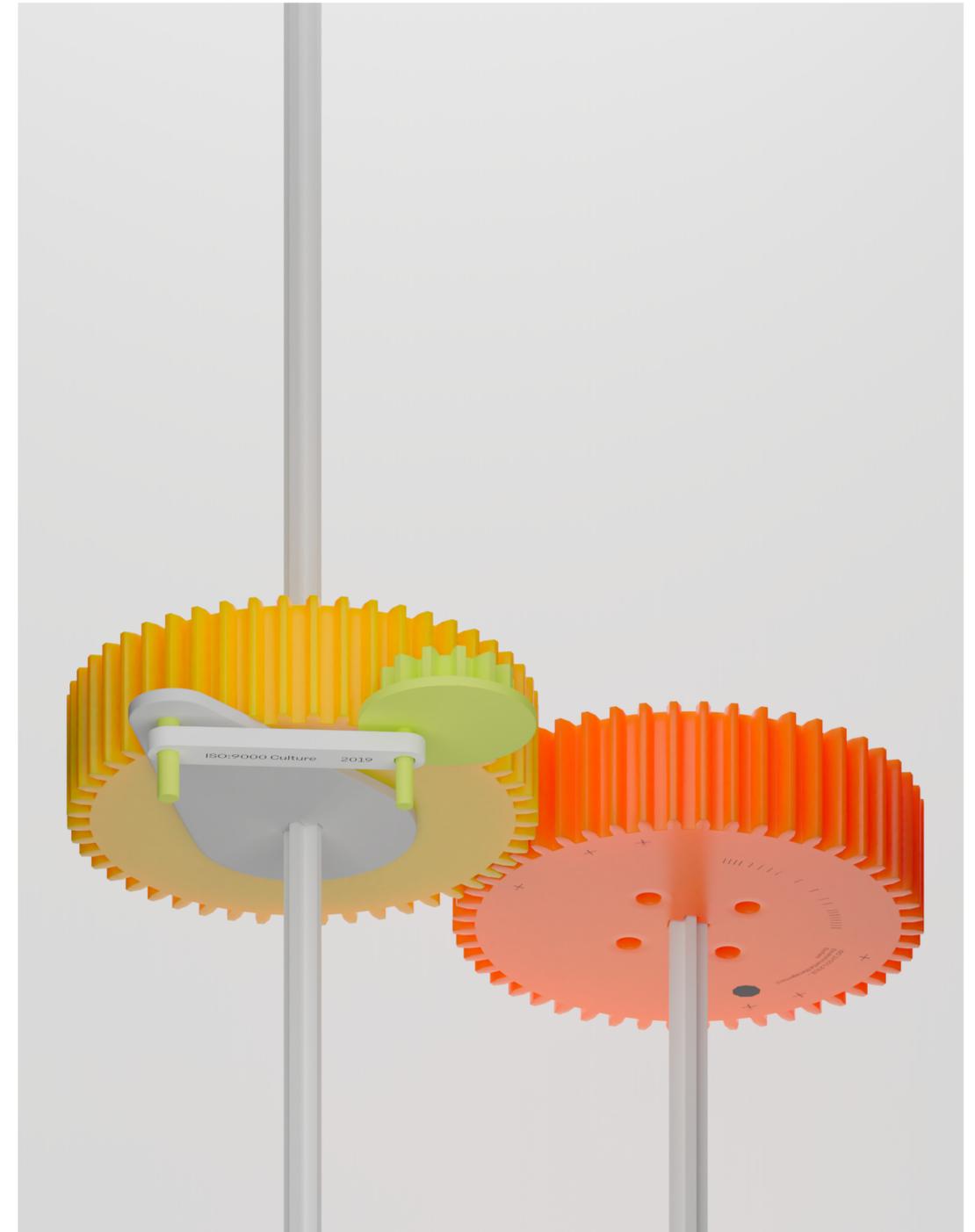
QMP's

Successful organisations have an

ongoing focus on improvement.

How to improve continuously our organisations? In this section you will find a set of resources on **capacity building & resilience development, evaluation culture** (with different methodologies and tools for assessment) and what **innovation** means for the cultural sector.

QMP's



## Capacity Building & Resilience

**Capacity Building** is essentially connected with an organisation's improvement process. UN defines it as: **"The ability of individuals, institutions, and societies to perform functions, solve problems and set and achieve objectives in a sustainable manner."** Capacity building in the non-profit sector normally focuses on things institutions might do to: expand the organisation or diversify its activities, change its strategy/direction or make it more effective in delivery. But an organisation do not have to wait for change to invest on capacity development: it should be an ongoing process towards improvement of your current activities. Capacity building leads to **resilient arts organisations**.

**Resilience** is defined as the vision and capacity of organisations to anticipate and adapt to Economic, Environmental and Social change by seizing opportunities, identifying and mitigating risks, and deploying resources effectively in order to continue delivering quality work in line with their mission. Especially important for arts organisations

in times of changes or crisis is also the concept of **Adaptive resilience**, i.e. the capacity to remain productive and true to core purpose and identity whilst absorbing disturbance and adapting with integrity in response to changing circumstances.



In this Prosper's resource about **Capacity Building** Gill Thewlis explores this concept within the context of the arts, cultural and heritage sector; and provides a seven-point approach to building capacity in organisations.



### **A Network Approach to Capacity Building**

developed by US National Council of Nonprofits, offers examples of how networks are especially effective for capacity building.



**Making Adaptive Resilience Real** (2010) from Mark Robinson and **What is Resilience Anyway?** (2018), are two studies commissioned by **Arts Council England** about resilience in the context of culture.

## Evaluation

Evaluation is a valuable tool for learning and therefore for improvement. Due to the wide scope of this theme, we divided the resources into different topics, including some tools developed by the non-profit sector that can also be useful for arts organisations.

→ [Evaluation is also the 1st step towards an Evidence-based Decision Making \(QMP 6\).](#) Many tools available in this section are also related to **impact measurement**.

Learning to evaluate

**Look, I'm priceless! Handbook on how to assess your artistic organisation** is a **IETM Toolkit** by Vassilka Shishkova. This toolkit aims to guide you through the key steps of evaluation and provides pre-conceived tools.

**Monitoring and Evaluation in Art for Social Change** is a research project developed by **International Centre of Art for Social Change (ICASC)**, from Canada. It offers tools for anyone interested in monitoring and evaluating community-engaged arts programs.

**Creative & Credible** focus on **evaluation of arts and health projects**. It was created by Willis Newson and The University of the West of England and offers knowledge, skills and resources for arts and health organisations and practitioners.

The toolkit **Is this the best it can be?** (2016) developed by **ArtWorks Scotland** aims to support and encourage those in the partnership, including participants, to build discussion and focus on what is important to each project or program and what would improve it.

**Better Evaluation** is an international public-good project based in Australia with contributors from many countries and organisations. They developed the **Rainbow Framework** that can be used for each task in an evaluation.

**Inspiring Impact's Learn to Measure** is a step-by-step guidance to help you plan for impact, carry out measurement, assess your data, and review your work.

**UK Evaluation Society Guidelines for Good Practice in Evaluation** are designed to help commissioners, practitioners and participants establish good practice in the conduct of evaluation.

*“Evaluation does not necessarily need to be imposed on you as a burden or a potential threat: it can be an initiative of yours in view of improving your own work and your position in your context of reference.”*

– Vassilka Shishkova

Evaluating Social & Learning Outcomes

**The Inspiring Learning for All (ILFA) Framework** was launched in 2008 and then updated in 2014 by **Arts Council England**. Within the framework, they have developed tools to help arts organisations to define and measure **Generic Social Outcomes** and **Generic Learning Outcomes**.



**Measuring Socially Engaged Practice: a toolkit for museums** (2018), by **Museums Association**, helps museums to design an approach to measure the social impact of a particular piece of short-term or project work through a range of different quantitative and qualitative evaluation techniques.



**The Impact/ Animating Democracy Program**, from **American for the Arts** presents a set of **Typical Social and Civic Outcomes**, as the 1st step to define social impact indicators for arts projects.



**The Qualities of Quality: Understanding Excellence in Arts Education**, (2009) commissioned by **Wallace Foundation** and developed by **Harvard Graduate School of Education's Project Zero**, explores the challenges of achieving and sustaining quality arts learning. The report includes tools to help arts educators build their own visions of high-quality arts education, identify markers of quality in their own programs and seek alignment among decision-makers at all levels.

Evaluating Quality, Excellence & Artistic Outcomes



**The Impact & Insight Toolkit** (former Quality Metrics) is a digital platform to help Arts Council England's funded organisations to evaluate the impact of their work on the people who experience it. Organisations can collect self, peer and public feedback in real-time and compare findings with aggregate data from other organisations. In the **projects reports** you can have access to principles and metrics and get inspiration for your own artistic evaluation.



**The ArtWorks Cymru Quality Principles** is a set Quality Principles for arts in participatory settings developed by **ArtWorks Cymru** in collaboration with **Arts Council of Wales**.



To support organisations to evaluate their work in a holistic way, **Australia Council for the Arts** developed the **Artistic Vibrancy Framework**. Covering five dimensions, it proposes a way for organisations to talk about artistic impact internally and with others.



The Impact/ Animating Democracy Program developed **Aesthetic Perspectives: Attributes of Excellence in Arts for Change**, a framework to enhance understanding and evaluation of creative work at the intersection of arts and civic engagement, community development, and justice.

## Evaluating Impact



**Impact Management Canvas**, is a tool developed by NESTA to help arts and cultural organisations think about how they monitor and evaluate impact and improve their impact management.



**Impact Playbook**, developed by **Europeana** is a cultural heritage professionals' guide to assessing impact. It is divided into six steps and provides a common approach that can be applied throughout the cultural heritage sector.

## Innovation



Innovation can be understood as the process of doing new things or doing things in a new way. Every improvement process involves certain degree of innovation (that can be either tech or non-tech, incremental or radical, related products or processes).

To understand how innovation manifests itself in cultural sector, Hasan Bakhshi and David Throsby (2010) proposed a new framework in the report **Culture of Innovation: An economic analysis of innovation in arts and cultural organisations**, developed for NESTA.



Want to start an innovation culture in your organisation? Check the free online course **Leading Innovation in Arts and Culture**. Developed by David Owens at Vanderbilt University and customized for the cultural sector with **National Arts Strategies**, it is designed to help arts and culture leaders to create an environment for innovation in its different formats.

# 6

# Evidence-based decision making

QMP's

Decisions based on the analysis and evaluation of data and information are more likely to produce desired results.

In all areas, including arts management, decision making can be a complex process: it involves risks, uncertainty and can lead to unintended consequences. 'Evidence-based' is a term that was originally coined in the 1990s in the field of medicine, but today its principles extend across disciplines as varied as education, public policy, social work, and management.

QMP's

Basing your decisions on evidence may not eliminate uncertainty but mitigates some risks and can give you reassurance for strategic decisions. In this section we selected a set of resources on **indicators, impact measurement** and **risk management** from the perspective of cultural and non-profit organisations.



## The importance of evidence

**Evidence** can be understood as **information, facts or data supporting (or contradicting) a claim, assumption or hypothesis**. It may come from different sources: scientific literature, organisation's own data and figures, or professional experience and judgment of practitioners and stakeholders.

B

To understand more about the concept of “evidence-based management” check the booklet **Evidence-Based Management: The Basic Principles** from the **Center for Evidence-Based Management – CEBMa**.

R

To know more about evidence-based decision making in practice, check **Evidence for good: How charities use evidence to boost their influence**, from Emma Taylor-Collins for **NESTA** and the **Wales Centre for Public Policy**. This report presents case studies from seven UK nonprofits which demonstrate the variety of ways that evidence can help – from getting off the ground, to improving practice, to influencing the external landscape.

## Indicators

Indicators are measures that show progress toward or achievement of outcomes. Either to measure an organisation's performance or to shape and evaluate public policies, indicators are key for an evidence-based decision culture.

Performance Indicators  
for Arts Organisations

T T

**The Impact/ Animating Democracy Program**, from **American for the Arts** developed a set of **Social Impact Indicators**. If you need a starting point, check the **Outcomes/Indicators Preliminary Menu**, a tool to help you articulate outcomes and specify indicators, with the additional early step of defining what data collection strategies would be needed.

R

If you look for other references in the cultural field, check the article **Performance Measurement in the Arts Sector: The Case of the Performing Arts** (2009) from Johanne Turbide and Claude Laurin for the International Journal of Arts Management. They surveyed 300 Canadian performing arts organisations that use multiple performance indicators to assess their own performance and fulfilment of their missions.

T

**Key Performance Indicators (KPIs) for Audiences: a practical guide** is an online toolkit developed by **The Audience Agency**. It answers the questions of what is a KPI, why use them and includes tips for setting and implementing your own organisational KPIs.

Indicators for/from  
Cultural Public Policies

R

The **UNESCO Framework for Cultural Statistics (FCS)** (2009) is a collaborative effort by the

**UNESCO Institute for Statistics (UIS)** and the UNESCO Culture Sector. Designed as a methodology for international and national application, its main goal is to facilitate international comparisons through a common understanding of culture and the use of standardized definitions and international economic and social classifications. You will find more indicators and data about **Culture and the Sustainable Development Goals** on **uis.unesco.org**.

W

**Eurostat Culture Statistics** presents reports and data from a selection of indicators on culture on the topics: cultural employment, international trade in cultural goods, cultural enterprises, cultural participation, use of internet for cultural purposes and private cultural expenditure. Eurostat is the statistical office of the European Union situated in Luxembourg.

R

The report **D'Art 18: Statistical indicators for arts policy** (2005) from **International Federation of Arts Councils and Culture Agencies (IFACCA)** provides a literature review on the topic.

R

R

For examples of cultural indicators for countries, check the report **Cultural Indicators for New Zealand**, by **New Zealand's Ministry for Culture and Heritage** and the report **A Framework for the Monitoring and Evaluation of Publicly Funded Arts, Culture And Heritage**, by Prof. Jen Snowball from **South African Cultural Observatory**.

## Impact, Theory of Change & Cultural Value

W

**Arts + Social Impact Explorer**, by **Americans for the Arts**, is an online primer that draws together top-line research, example projects, core research papers, and service/partner organisations about 26 different sectors, all in an effort to make more visible the wide-reaching impact of the arts.

R

Developed for [Arts Council England](#) by John D. Carnwath and Alan S. Brown, [Understanding The Value And Impacts Of Cultural Experiences: A Literature Review](#) (2014) presents an comprehensive overview of the commonly known frameworks and methodological approaches that have been used to investigate how individuals are affected by their experience of arts and culture.

R

The research [The cultural value project: Cultural relations in societies in transition](#), conducted by [Hertie School of Governance](#) in cooperation with the [Open University](#), uses examples of collaboration projects in Turkey and Egypt to draw a comprehensive picture of different approaches and forms of international cultural activities abroad, identifying shaping factors and conditions for a lasting and sustainable impact in societies.

## Thinking your impact: Theory of Change

**A Theory of Change** is a starting point for arts and cultural organisations working out their impact strategy. The outcomes of a theory of change typically concern the changes that are expected in the beneficiary (usually an individual or a community) as a result of an activity or intervention.

If you want to create (or review) the Theory of Change of your project or organisation, check these three selected tools:

T

[The theory of change guide and template](#) developed by [Art's Impact Fund/NESTA](#)

T

The [Happy Museum Project](#) developed the [Story of Change](#) approach and offers tools and guidelines to use it.

T

[NPC's Theory of Change page](#) offers wide range of materials and guides for non-profit organisation.

## Risk Management

Collections and museums on fire, incidents during live performances, bankruptcy, changes on government, funders and sponsors. We cannot foresee the future, but every organisation can mitigate risks based on evidences and on a good scenario analysis. Risk management involves understanding, analysing and addressing risk to make sure organisations achieve their objectives. It must be proportionate to the complexity and type of organisation involved. So no matter the size of your cultural organisation, risk management should be a topic on the table.



The [Creative NZ – Arts Council of New Zealand](#) published in 2014 a [Risk Management Toolkit for arts organisations](#) to help managers, administrators, and boards to develop and implement a risk management strategy.



[Voluntary Arts](#) offers valuable briefings about Risk Management for non-profit and arts organisations, such as [Risk Management for Charities](#), [Risk Management for Event Organizers](#) and [Crisis Management and Disaster Discovery](#).



[What If? The Art of Scenario Thinking for Non-profits](#) (2004) is a downloadable book from Diana Searce and Katherine Fulton for Global Business Network (Monitor Group). It presents an approach to scenario thinking and planning for nonprofit organisations, including a definition of scenario thinking, examples of scenario thinking in practice, and stories and lessons from the field.



Also coming from the non-profit sector, UK's Government, through the [Charity Commission from England and Wales](#), updated in 2017 the [Guidance: Charities and risk management \(CC26\)](#), an useful guide that outlines the basic principles and strategies to help non-profit institutions of all areas to recognize and manage their Governance, Operational, Financial and External risks.

# 7

# Relationship Management

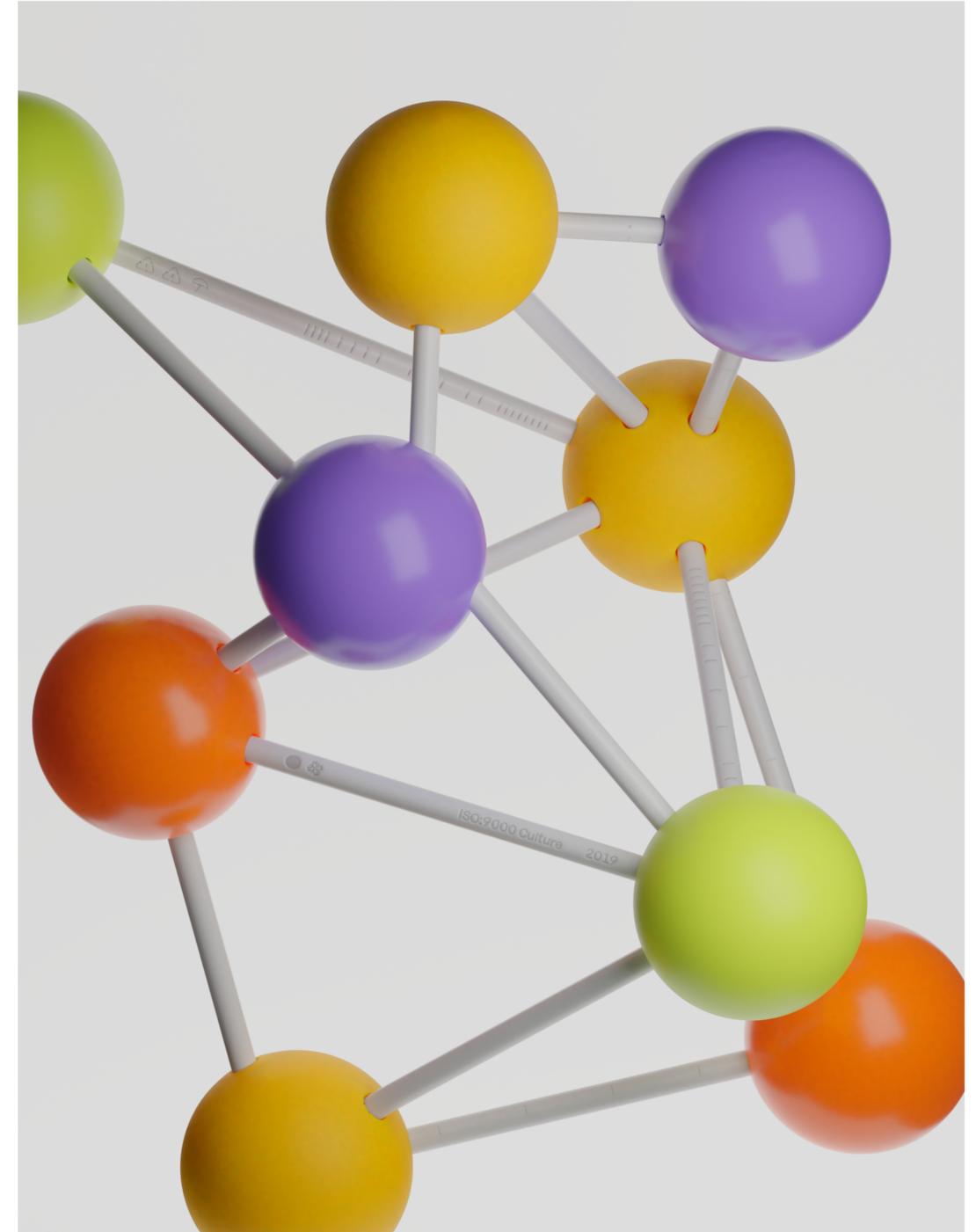
QMP's

For sustained success, an organisation manages its relationships with interested parties, such as suppliers.

No organisation is an island.

Their activities rely on a delicate network of stakeholders, including their audiences, partners, sponsors, funders and suppliers. In this final section we present a group of resources covering many topics on relationship management, such as **collaboration and partnerships, networks, advocacy, ethical guidelines** for collaborations and fundraising.

QMP's



## Who are your stakeholders?

According to the **Cambridge Dictionary** stakeholder is

*“a person such as an **employee, customer, or citizen** who is involved with an organisation, society, etc. and therefore has responsibilities towards it and an interest in its success”.*

Stakeholders include also other organisations, private and public bodies related to your organisation or project.

**T** Institute of Risk Management’s **Tools for stakeholder mapping** share best practice in stakeholder engagement across charities by providing a basis for organisations to map their key stakeholders and consider different communication strategies when interfacing with them.

→ Audiences are some of cultural organisation’s most important stakeholders. Check **QMP1: Customer focus** for resources on how to know, expand and diversify your audiences.

## Collaboration & Partnerships

*Explore the wide range of partnerships possibilities between cultural organisations, companies, government or organisations from other sectors.*

**R** **To be debated: The Power of Partnerships** (2017), written by Marilena Vecco and Elmar D. Konrad for the **European Centre for Creative Economy**, explores the reasons, approaches and benefits of collaboration in the cultural and creative sectors.

**T** The **Art of Collaboration: A Toolkit for Non-profit Arts Organisations** developed by **Paul Gravett Consulting**, details the process of establishing relationships, structures, goals, outcomes

and measures. It is meant to help two arts organisations coming together to jointly present a performance or event.

**T** **The Good Collaboration Toolkit**, developed by **The Good Project**, contains materials that help set up successful collaborations. Though it is not focused on the cultural sector, it can be very useful for arts organisations that want to engage or review their partnerships.

**T** Being commissioned (establishing a partnership or contract with a public body to provide a service of public interest) gives an opportunity for the arts and cultural sector to deliver contracts for a whole range of public services. Produced by Royal Opera House Bridge, Artsworld and Kent County Council (KCC), the **Arts and Cultural Commissioning Toolkit** is useful for anyone involved in assessing needs, designing services, sourcing providers, monitoring and evaluation on both sides of partnership.

T

**The pARTnership Movement** is a campaign of **Americans for the Arts** designed to reach business leaders with the message that the arts can build their competitive advantage. They offer a series of toolkits about business volunteering, employee's groups, partnerships with chambers of commerce, and more.

R

**Connecting Arts & Business: Realising The Potential for Creative Partnerships** (2015), developed by an international group of organisations and co-funded by the Culture program of the European Union, presents typologies and shows many examples of interactions between companies and arts.

R

**Creative partnerships** are defined as partnerships between cultural institutions and other sectors (such as education, training, business, management, research, agriculture, social sector, public sector, etc.), that help transfer creative skills from culture into other sectors. The EU's

**Policy handbook on promotion of creative partnerships** (2014) makes concrete suggestions on how creative partnerships can be operated.

## Advocacy

*Advocacy is also a way to relate and to give your organisation or project work a broader impact.*

OC

The **Culture and Creativity Platform** developed **The Advocacy Course** to help cultural organisations to create an advocacy campaign: from the stage of finding the problem to evaluating the results.

T

**How to make the case** is a **Arts Council England** toolkit that can help you tell a story about how your work positively impacts people's lives. It includes simple tips that you can achieve quickly to make the case for art and culture.

W

The **Advocate Hub from American for the Arts** is a good example of advocacy for the cultural sector. It provides tools, research and training to help arts professionals and citizens to become arts advocates. Even if created for the American context, it can offer inspiration for your campaign or sector mobilisation.

## Networks

*Taking part in local, national or international networks expands your possibilities of collaborations, access to knowledge and visibility.*

T

The Culture Department of European Commission offers an extensive **list of European Networks**

W

**Res Artis** is a worldwide network of artist residencies involving over 600 centers, organisations, and individuals in over 70 countries.

W

The **International Federation of Arts Councils and Culture Agencies (IFACCA)** is the global network of arts councils and ministries of culture, with member institutions in over 70 countries. The IFACCA Secretariat provides services, information and resources to member institutions and their staff - from senior executives and policy makers, to researchers, grant makers and administrators – as well as the wider community.

R

Check the **IFACCA Report D'Art 49 on International Cultural Networks**. The report looks at the various ways in which cultural networks operate, including their resources, membership, funding and activities, views on the purpose of cultural networks, challenges and potential solutions, and their vision for the future.

W

**Arts Management Network** is an international platform for arts managers, researchers, students, policy makers, journalists and professionals in the arts and creative sector around the globe.

## Ethic guidelines

*Partnerships and fundraising practices should be aligned to organisation's ethics and values.*

T

The guide **Creating ethical guidelines for fundraising**, by Sarah Winchester for **Culture Hive**, provides useful advice on how to set up ethical guidelines to ensure that trustees, staff and any potential commercial partners share a common understanding of your organisation's ethical values.

T

Check also the **Ethical Fundraising Policy Template** drafted by Arts Fundraising and Philanthropy, an useful tool to help you design your fundraising policy or check that the one you have is ethical.

W

T

**What Next?** is a movement bringing together arts and cultural organisations from across the UK. The publication **Meeting Ethical and Reputational Challenges** (2016) offers practical guidance and is intended to help leaders meet such challenges with a greater sense of confidence.

R

The **Study Book for Students, Stakeholders and Researchers** (2016) developed by the project **Managing Art Projects with Societal Impact (MAPSI)** has a section dedicated to Ethics and Responsibilities of Cultural Managers with useful concepts (p. 49 – 61).

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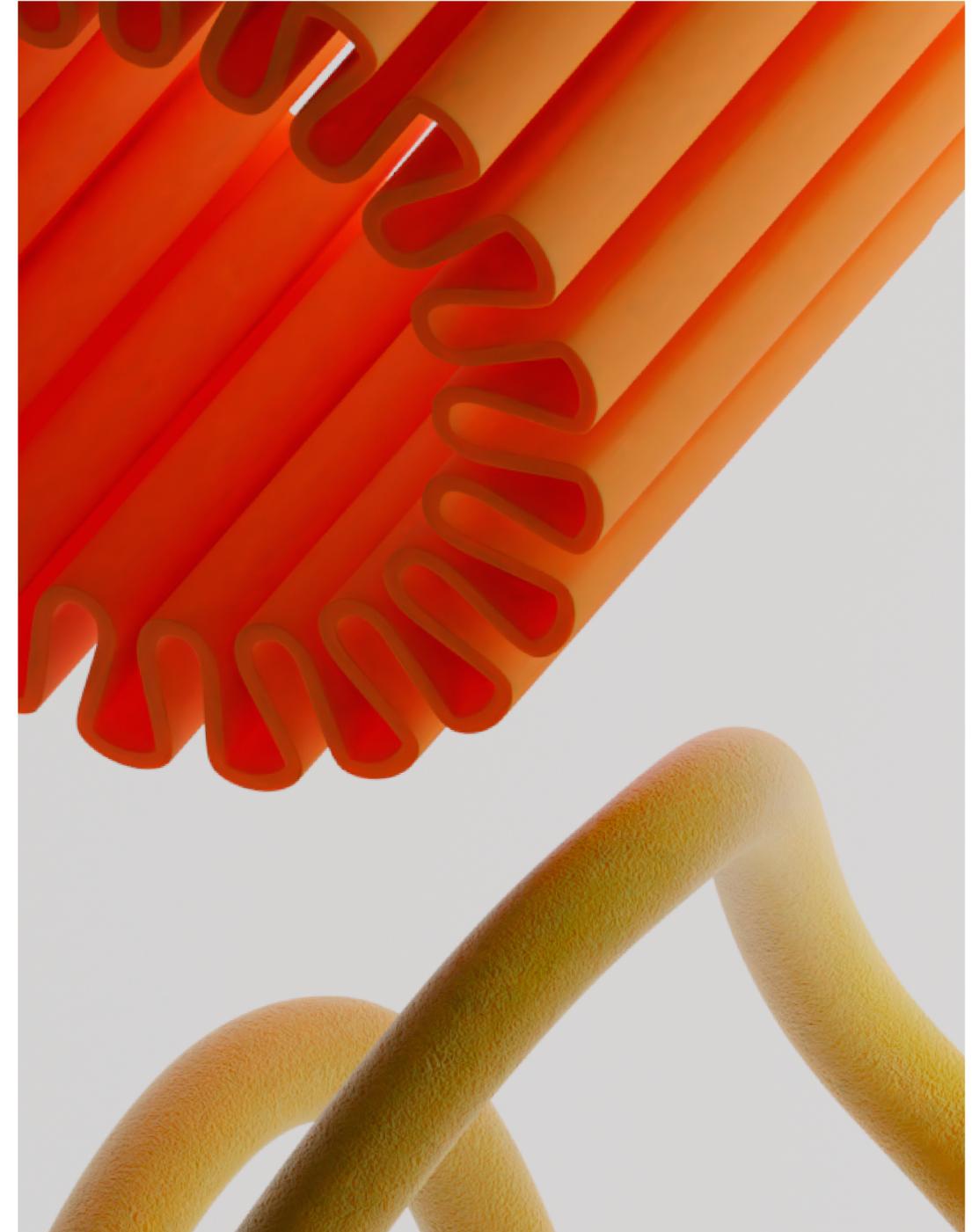
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# Extra I

## Digital is everywhere: how digital transformation benefits cultural organisations

From creation to consumption, all steps in the value chains in culture and creative sectors have been influenced by digital transformation and digitisation. Digital solutions are a key ally in the pursuit of quality management and can help organisation's activities in diverse areas, such as Marketing, Fundraising, Preserving and Archiving, Operations, Distribution & Exhibition, and Creation. In this special section you will find reports, videos and online courses about impact and benefits of digital transformation for the cultural sector.

Intro



## Digital Maturity

According to UK's Department of Digital, Culture, Media and Sport (DCMS) Policy Paper **Culture is Digital**, digital maturity means **a state where digital activity is embedded across an organisation throughout every part of the business, from admin and security, to e-commerce and asset management.**

Indeed, cultural organisations are more likely to experience benefits from digital technologies if they are digitally mature. But maturity does not mean they must master every digital tool, be present in every social network or implement digital solutions to all their activities. As every process, it does not happen overnight and means different things according to your activities, context, audiences and especially to the organisation's real needs.

V

In the lecture **Digital transformation as a matter of values**, held in 2018 during the conference "smARTplaces | INNOVATION in Culture", pro-

moted by **ZKM | Karlsruhe**, the professor and change management expert Martin Zierold reflects upon the wrong ways arts sector addresses digital transformation and the potential benefits of a data sharing culture.

*"When it comes to digital transformation, digital is not the answer. Transformation is."*

– George Westerman

R

**A new age of culture: The digitisation of arts and heritage** (2016) is an Economist Intelligence Unit (EIU) report commissioned by Google. The report explores the progress cultural institutions in 22 countries have made towards using digital tools to improve and access to their offerings.

R

The study **Mapping the creative value chains: A study on the economy of culture in the digital age** (2017) maps the different value chains for visual arts, performing arts, cultural heritage, music and other areas and also examines how the competitive position is affected by digitisation.

It was commissioned by the **Directorate-General for Education, Youth, Sport and Culture** (European Commission).

R

**Digital Culture** is a **Arts Council England** and **NESTA** study of technology usage amongst arts and cultural organisations. From 2013 - 2017, the study has charted how organisations use digital technology in different ways, and the associated opportunities, impacts and challenges they experience.

R

**Live Performances in Digital Times: an Overview** (2016), from **IETM**, explores how digital technologies are used at the different stages of the artistic process and to what aims. Pairing a solid theoretical part with many examples from across Europe and outside, it provides an overview of live arts in digital times.

R

**FROM LIVE-TO-DIGITAL: Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution**

is a research developed by **AEA Consulting**, commissioned and funded by Arts Council England (ACE), UK Theatre, and the Society of London Theatre (SOLT). This comprehensive study investigates the opportunities that ‘Live-to-Digital’ – the combination of Event Cinema, streaming and downloading online, and television broadcast – presents across the full range of arts and cultural forms.



**Digital isn't different**, a special section of **Collections Trust**, offers a wide range of resources to help museums interested in sharing content online, including resources on digital preservation, digital assessment management and copyright and licensing.



The report **Counting What Counts: What Big Data can do for the Cultural Sector** (2013), from Anthony Lilley and Professor Paul Moore for **NESTA**, aims to help cultural decision-makers to understand the importance and the potential of big data and to harness its potential.



**Building Digital Leadership and Resilience in the UK's Cultural Sector: What qualities of leadership are needed to ensure the resilience of cultural organisations in the digital age?** (2016), by Dr Ceri Gorton for **Clore Leadership**, provides new insights for cultural leaders to consider how they can approach the use of digital technology to enhance the resilience of their organisations.



The free online course **Culture in the Digital Age**, developed by the **European University Institute**, explores how digital technology creates new opportunities in inter-national cultural relations. You will be introduced to tools to build a digital strategy in order to reach an international audience and establish global networks.



Looking for digital solutions? The **Charity Catalogue** aims to help non-profits easily and quickly discover the best online tools and resources that will help them level up their impact.

## Who could be your “tech champion”?

Arts Council England launched in spring 2019 a **Digital Culture Network** to support the development of individual skills and the digital maturity of organisations across the arts and cultural sector in England. As part of Network's activities they have selected a group of **Tech Champions**. They are digital specialists who provide arts organisations support and training in the following areas: data analytics, Websites, Digital marketing & strategy, Social media, Box Office & CRM, Search Engine Optimisation and Search Engine Marketing / PPC, eCommerce & merchandising, and Video & Photo content.

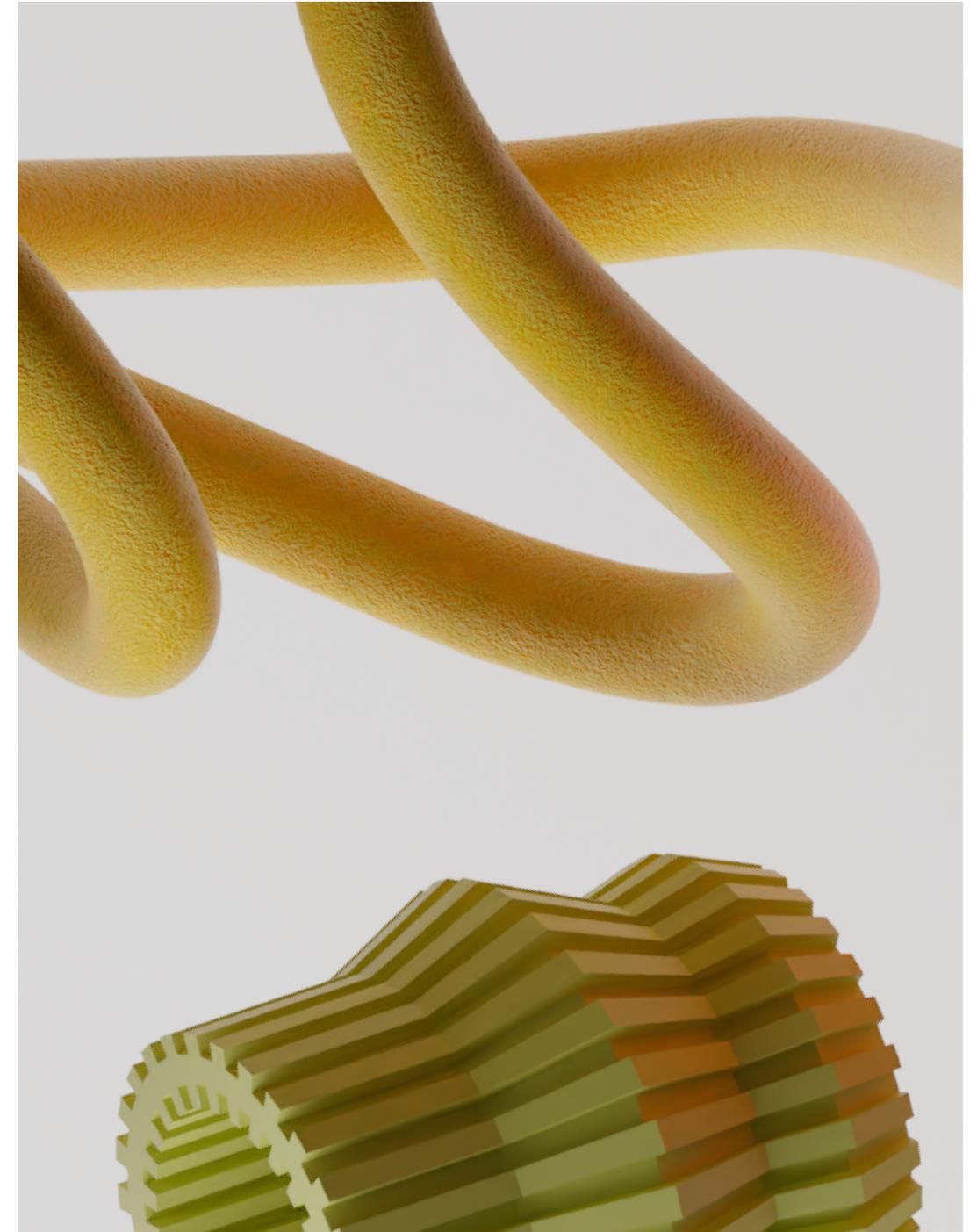
Look around your funders, partners, sponsors and other stakeholders to see what digital expertise they have and how they could help you with tips and guidance in any of these areas. Maybe your own tech champion is right next to your organisation.

# Extra II

## Environmental Sustainability & Arts Management

Climate change and environmental sustainability are issues concerning all areas in our society. The cultural sector is not an exception and its organisations can even have a leading and inspiring role for other sectors. In this extra section, you can have access to a selected set of resources to help you raise environmental sustainability awareness among your team and to create new practices in your physical spaces and projects.

Outro



W

**Julie's Bicycle** is a London based charity that supports the creative community to act on climate change and environmental sustainability. Their **resource hub** offers dozens of practical tools and support on how to take climate action now, to get up to develop an environmental policy, and more. We selected a few examples for you:

R

**Museums' Environmental Framework** (2017) features case studies and insights from several museums in UK to celebrate good practice and inspire more. There is also a version in Spanish.

R

**Energising Culture** (2012) is a guide on future energy strategies for cultural buildings.

T

**Touring Guide** (2015) focuses specifically on the touring aspect of projects and covers topics including routing, accommodation and liaising with venues.

T

**Sustainable Production Guide** (2013) offers a series of checklists for each role in the production process, separated into pre-production, production, and post-production.

T

**The Sustainable Cultures Engagement Toolkit** (2013) is the outcome of a two year research project 'Sustainable Cultures' between the **Royal College of Art** and **Johnson Controls**. It provides workshop templates, recommendations and examples on how to develop sustainable initiatives in your workplace involving your team.

T

T

**Inspirador 1.2: International guidelines for sustainable cultural management** (2017), developed by **Goethe Institute**, lists strategies and tools from the field of cultural production and contains 48 examples to recreate, from developing a fair work schedule to communicating with the audience. It is an updated and more complete edition of **Inspirador 1.0**, first version of the guideline developed in Brazil in 2015, in Portuguese.

W

**The Center for Sustainable Practice in the Arts** is a Think Tank for Sustainability in the Arts and Culture. They promote research and initiatives positioning arts and culture as a driver of a sustainable society.

## ISO 14001:2015 - Environmental Management System

For cultural organisations that adopted quality management standards it is easier to achieve also environmental certifications. This was the case of **Guggenheim Museum Bilbao** in Spain and the **Staatsgalerie Stuttgart** in Germany.

The **ISO 14001:2015** sets out the criteria for an environmental management system and can also be used by any organisation regardless of its activity or sector.

# Endless Knowledge

## Where to find more resources

Many of the resources in this guide were made available through the valuable work of several organisations, networks and knowledge platforms in the arts management field. If you are still eager for knowledge, check this list with some of the main platforms and explore their varied set of resources on governance, social impact and cultural value, partnerships and more.

Be your own curator.

American for the Arts - Animating Democracy  
[www.animatingdemocracy.org/resources](http://www.animatingdemocracy.org/resources)

Arts & Culture Knowledge Base  
[www.cultureknowledgebase.eu](http://www.cultureknowledgebase.eu)

Artswork  
[www.artswork.org.uk/resources](http://www.artswork.org.uk/resources)

Culture Case – King's College London  
[www.culturecase.org/contents](http://www.culturecase.org/contents)

Change Creation Resources  
[www.changecreation.org/resources](http://www.changecreation.org/resources)

Cultural Governance Alliance  
[www.culturalgovernancealliance.org/knowledge-library](http://www.culturalgovernancealliance.org/knowledge-library)

Culture Hive – Prosper Resources  
[www.culturehive.co.uk/prosper](http://www.culturehive.co.uk/prosper)

Culture Partnership Tools  
[www.culturepartnership.eu/en/tools](http://www.culturepartnership.eu/en/tools)

Culture Counts (Cultural Value Researches)  
[www.culturecounts.cc/research](http://www.culturecounts.cc/research)

European Commission / Culture - Library:  
[www.ec.europa.eu/culture/library\\_en](http://www.ec.europa.eu/culture/library_en)

Inquiry into the Civic Role Arts of Organisations  
[www.civicroleartsinquiry.gulbenkian.org.uk/resources](http://www.civicroleartsinquiry.gulbenkian.org.uk/resources)

Inspiring Impact  
[www.inspiringimpact.org/resource-library](http://www.inspiringimpact.org/resource-library)

International Center of Arts for Social Change  
[www.icasc.ca/resources](http://www.icasc.ca/resources)

Museums Association  
[www.museumsassociation.org/policy/resources-a-z](http://www.museumsassociation.org/policy/resources-a-z)

National Arts Strategies (NAS) – Resources & Insights  
[www.artstrategies.org/resources-blog](http://www.artstrategies.org/resources-blog)

NCVO (The National Council for Voluntary Organisations) Knowledge Bank

[www.knowhow.ncvo.org.uk](http://www.knowhow.ncvo.org.uk)

NEMO – Network of European Museum Organisations

[www.ne-mo.org/about-us/resources.html](http://www.ne-mo.org/about-us/resources.html)

PARTnership Movement

[www.partnershipmovement.org/tools-resources](http://www.partnershipmovement.org/tools-resources)

Sayer Vincent - Made simple guides

[www.sayervincent.co.uk/resources/made-simple-guides](http://www.sayervincent.co.uk/resources/made-simple-guides)

Trans Europe Halles

[www.teh.net/resources](http://www.teh.net/resources)

UNESCO - Culture Sector Knowledge Management Tools

[www.en.unesco.org/themes/protecting-our-heritage-and-fostering-creativity/culture-sector-knowledge-management-tools](http://www.en.unesco.org/themes/protecting-our-heritage-and-fostering-creativity/culture-sector-knowledge-management-tools)

Voluntary Arts

[www.voluntaryarts.org/list-of-all-briefings](http://www.voluntaryarts.org/list-of-all-briefings)

What Next Culture

[www.whatnextculture.co.uk/resources](http://www.whatnextculture.co.uk/resources)

Wallace Foundation Knowledge Center

[www.wallacefoundation.org/knowledge-center/pages/default.aspx](http://www.wallacefoundation.org/knowledge-center/pages/default.aspx)

Visual Artists Ireland – “How To Manual”

[www.visualartists.ie/resources-\\_the-manual](http://www.visualartists.ie/resources-_the-manual)

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We never learn alone.

# About the Author

Outro

Beth Ponte is a Brazilian arts manager and researcher, with extensive experience in the non-profit sector and new management models for cultural public policies. She was German Chancellor Fellow of Alexander von Humboldt Foundation and Visiting Researcher at the Institute of Arts and Media Management (KMM Hamburg) during 2018 and 2019. From 2010 to 2018 was Institutional Director of NEOJIBA Program (Centers for Youth and Children's Orchestras of the State of Bahia). She is a publishing collaborator of Arts Management Network and in 2012 has published the book "Por uma cultura pública: Organizações Sociais, OSCIPs e a gestão pública não estatal na área de Cultura" (For a public culture: Social Organisations, OSCIPs and non-state public management in the area of culture). Since 2013, she is member of the Board of the Brazilian Association of Social Organisations of Culture (ABRAOSC).

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