Overview report on CreativePeople Co-ordinator roles

Commissioned by New Audiences Programme

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Contents

Summary

Although NAP has a focus on audiences, Creative People is about CPD at a national, cross-artform level. The link and relevance to audiences is that a more inclusive infrastructure and sector (organisations, individuals, practitioners, etc) create more pathways to participation, inclusion and attendance by cultural minority groups and disabled people, by developing the capacity to undertake effective and long term audience development.

In that sense, NAP's strategic input of £120,000 made possible the following resources:

*   Two full-time posts to develop appropriate projects (£10,000 contribution to each co-ordinator role)

*   Retention and employment of two practitioners in the Coach and Mentor roles

*   Working budgets for each co-ordinator of £50,000 to fund activity

The main output is a portfolio of eleven projects seeking to:

•   Support organisational change within mainstream arts organisations

•   Address barriers to attendance at and participation in the arts

•   Develop practice by supporting community based cultural organisations

•   Develop connections with the mainstream by developing new partnerships between community-based organisations and mainstream arts organisations to attract new diverse audiences to the arts

Other outcomes include:

*   Regular presence and representation of cultural diversity and disability issues on CP Partnership Group

*   Resource of information, contacts and skills related to cultural diversity and disability within the CP network

> *'Exponentially multiplied the impact of CreativePeople on arts sectors' awareness. Having 2 full-time coordinators talking about and doing CreativePeople stuff for more than a year has had major results. Having 2 people within ACE National office with*

> *CreativePeople in their job titles and in everything they do and produce has resulted in political, strategic and financial gain for CreativePeople. Their presence and activity has strengthened the network and enhanced its sustainability.'*

* Unprecedented level of individual development support for the co-ordinators: coach/mentor and evaluation

* Additional information and experience in the use of human resources to support project, organisational and professional development, specifically how co-ordinator/coach/mentor roles differ and indication of effectiveness of approach, taken individually and collectively

* Reported increased awareness and understanding of diversity and disability issues, supporting effective and realistic policy and activity development by CP network

* Appropriate documentation related to co-ordinators' role and activity (individual co-ordinators' interim evaluation and overview reporting) to demonstrate value for money and effectiveness

Recommendations

AAP were commissioned to make recommendations in relation to evaluation support and processes for CreativePeople in the 2nd Year, but there are some recommendations relating to CP and the infrastructure:

* Exit planning needs to start as soon as possible.

* This overview looked at the Creative People co-ordinators only, which is not the same as an ongoing evaluation of the network. The issues coming up from the overview suggest that there is an urgent need to build on the business plan by developing an evaluation plan for Creative People as a whole and putting it into action straightaway.

* CP Partnership Group, the co-ordinators, coach/mentor and ACE should use the planning process to resolve the issue of ownership referred to in the findings, by clarifying the position of the co-ordinators and establishing the remit of both CP and ACE with respect to these roles.

Recommendations relating to the co-ordinator roles include:

* Contracts for co-ordinators should be for a minimum two year period, to allow for solid induction, familiarisation, consultation, project development and delivery with a working budget to implement projects and the same support structures.

* The co-ordinators and coach/mentor should have more choice and control over the pairing process and an annual review should ensure that the support roles adapt to the co-ordinator's rate of progress, look at changes that need implementing and issues that need addressing.

The most effective point for this would be after this evaluation process, to assist planning for year 2.

* The co-ordinators should have access to support for the completion of the self-evaluation until the completion of the contracts in 2004 to provide professional development and ensure high standards of reporting.

Recommendations relating to the coach/mentor roles include:

* The Coach and Co-ordinator should be asked before administrative and line management changes are implemented.

* Support and professional development needs for the coach and mentor roles should be considered as part of the 'package', alongside the support for the co-coordinators and reporting process.

* CP and ACE should consider ways in which they can build up a 'pool' of mentors/coaches from different areas of expertise and specific groups to ensure that the support exists in the future and is not reliant on a small group of individuals.

* CP and ACE need to establish a clear line of responsibility for the coach – it is inappropriate to think of the role as being line managed by the co-ordinator's manager, as the coach or mentor is usually operating at a peer level with senior management: Lead Contact is a more relevant and accurate title.

* Together with clarity and consistency about line management and the related brief, the coach and mentor roles would benefit from a clear communication structure, such as the 'Who does what, why' document referred to by the coach.

* Evaluation should be built in as a core part of the brief with appropriate days allocated for the coach/mentor and co-ordinator roles.

Part 1: Introduction & Findings

This report takes an overview of the activity undertaken by the Cultural Diversity and disability Co-ordinators, working within the framework of the national network known as CreativePeople (CP). The report also documents the process and support provided to assist the Co-ordinators in achieving integrated self-evaluation of the activity and projects arising thereof, and offers an analysis of the effectiveness of the tools and approaches employed. Finally, there are a number of recommendations to support the evaluation and processes for the Creative People Co-ordinators in year 2 of activity and in documenting the overall pilot results.

The brief for this report was agreed in collaboration with the New Audiences Programme (NAP) manager, drawing on the consultants' previous evaluation work relating to Gateways 1 and 2 of NAP 2000-02.

The brief

NAP has a commitment to report on and evaluate the projects within the five gateways for reasons of good practice and accountability, as well as being a way to disseminate the findings and experiences of a coherent and relatively long-term programme of audience development.

Sarah Bedell and Richard Whitehouse (working as Aspirational Arts Partnerships – AAP) were commissioned to:

* provide the Creative People Diversity and disability coordinators and their respective coaches with flexible support for self evaluation of their projects and work, delivered where necessary – through written materials, face to face meetings, phone and e-mail contact – and as negotiated with the co-ordinators and coaches.

* coordinate all self evaluation materials produced by the coordinators and coaches and to construct a report structure based on preliminary reports in discussion and agreement with NAP

* write and produce an overview report for NAP, comprising an overview of Creative People, NAP investment in CP, detail on the 'development' budgets to awarded grant recipients, analysis of coordinator work, issues and processes /partnerships - and the coordinators roles in supporting the project

* construction of an evaluation template and follow up interviews/meetings where necessary to obtain information from creative people development fund recipients.

* facilitation of a final evaluation review meeting in September 2003 at which the draft report will be available and coordinators/coaches can feed comments in.

* recommendations for evaluation support and processes for Creative People in the 2nd Year.

Introduction to Creative People

CP's mission statement is to create a national network that will support providers of information, advice and guidance on professional development in the arts and crafts by sharing information and expertise.

CP is a network of over 140 arts and cultural organisations, providing information, advice and guidance on professional development in the arts and crafts. There are currently ten partnerships representing four English regions (London, South East, South West and North East), four artforms (crafts, dance, literature and visual arts) and two cross-sectoral partnerships (arts management, community arts).

Creative People does not provide specific training to arts and crafts professionals, but focuses on network development. The network is a virtual organisation; it is a complex weave of organisations working together in many ways. Working groups have been established to carry out specific tasks, as of October 2003 there were 10 working groups (see appendix 1 of disability Co-ordinator's report).

CP employs a full time Project Manager, who supports the network and the development of CP. Arts Council England employs a fulltime Cultural Diversity Co-ordinator and a disability co-ordinator with a remit to help CP build an inclusive network/service.

As part of New Audiences Programme (NAP) funding, the Co-ordinator role was supported by a Coach/Mentor role. There were two main reasons to develop this role:

*   To support the co-ordinator post, given the complex situations within which the co-ordinator would work and the competing agendas of the numerous factions involved in the work.

*   To test the viability/usefulness of a coach or mentor for people working in the arts.

NAP provided £50,000 capacity budget and £10,000 towards the costs of the Coach/Mentor Role for each co-ordinator (a total of £120,000).

The Methodology

'Supportive' self-evaluation is based on consultation and collaboration, so it requires active participation from those involved and an active commitment to the process as well as outputs and outcomes. This approach builds on evidence that the most effective points at which to offer support are at:

* the planning stage, when specific support at different times during the process can be tailored to the individual or organisation's need in terms of achieving useful and effective evaluation

* the review stage, when reflection and analysis turns the evaluation process into a powerful business and management planning tool

Overall, supportive evaluation can be used in different ways: from the practical, hands-on perspective to the strategic, acting as a critical friend in some cases, and having a variety of roles throughout the process that support the organisation as they work through it. AAP's approach is based on the idea that evaluation can provide a way of recording, reporting and reflecting on what happened, what worked and why, and should be:

1. A way of showing how an individual, organisation or partnership has improved practice and increased understanding through a project

2. A valid and equal part of the creative process, enabling participants, attenders and artists to contribute and feedback on how the project worked for them, as well as the project team

3. Of practical help to individuals and organisations for running a project in real time, because they know what the progress has been, and can make changes on an informed basis

4. A decision-making tool when it comes to planning future activity (or trying something new/different)

5. Useful when identifying funding sources, as organisations/individuals, etc are able to demonstrate a track record or a need for support in new areas

6. A resource in the future when planning other activity

7. An archive and resource for publicity, funding and advocacy purposes, with a variety of ways to evidence success and results

8. A grass-roots tool for influencing policy-making and funding decisions, because individuals/organisations are able to demonstrate what works at the practical and organisational/attender/participant level

AAP believes that in working with clients, the process and support needs to be underpinned by the principles that evaluation can: provide a flexible framework; reduce the burden of worry; help manage partnerships; improve practice; offer a range of measures of success for creative projects.

The overview evaluation takes a slightly different form, by working with stakeholders and clients to agree the aims and objectives of an overview evaluation. The process then follows the basic P4L format, adapted to the brief, of planning the work, contact, communications and information requirements (what evidence, when, who, what), collecting and collating information, regular updating and recording, followed by analysis and recommendations for development, taking into account both the factors for success and significant challenges/issues.

The CP co-ordinators were invited to tailor the individual support to their needs, after discussion with AAP around experience and confidence relating to the documentation and self-evaluation of their work. The ways in which AAP supported the co-ordinators and coaches included:

- Agreed familiarisation and planning meetings with the co-ordinators and coaches to work through the self-evaluation process, discuss progress and review according to agreed aims, objectives and targets. This included a group and individual introductory sessions.

- Provision of written guidelines relating to documentation

- E-mail discussions and queries for co-ordinators and coaches, as well as access to advice, discussion and information by phone

- Input and support (eg editing, reading through, etc) on co-ordinators' documentation and evaluation reports through meetings, feedback by e-mail and phone

- Group meetings with co-ordinators, Partnership Group representatives, coaches and line managers at agreed points through the process

- Facilitating the review process with the co-ordinators and coaches, leading to the production of their individual evaluation reports (undertaken separately, not jointly, at the co-ordinators/coaches' request)

- Ongoing updates and requests for information regarding reporting by phone or e-mail

This support was offered in a number of flexible ways: frequency and type of contact, venues and timing for meetings, formats and agendas were driven by the co-ordinators and coaches, as agreed at the initial meeting in October 2002.

Description of AAP activity

An introductory meeting with AAP, Co-ordinators, coaches, line managers and representatives of the CP Partnership Group outlined the approach suggested, and established the first need for the Co-ordinators to decide what kind of support would be most useful and appropriate for them. This was also the first opportunity for AAP to familiarise themselves with CP as an entity, although it was clear from the outset that the remit of AAP's brief was limited to the Co-ordinator roles, because of a NAP investment.

Follow-up meetings with the Co-ordinators and coaches took them through the planning process and encouraged the production of an outline against which to collect evidence for the later stages of analysis and review. This was supported with guidelines and notes where necessary, and follow-up e-mails or phone calls. This could be quite detailed and lengthy (eg an hour on the phone).

Follow-up phone calls and e-mails took place throughout the period of activity with the Co-ordinators, Coach and Mentor, and AAP were essentially at the Co-ordinators' disposal, in terms of achieving their self-evaluation. This enabled the Co-ordinators to integrate the evaluation process into their project management, through having access to advice and support the whole way through. AAP were also available to the Coach and Mentor, although in the event, the Coach took up this offer more often than the Mentor.

Review meetings with the Co-ordinators, Coach and Mentor took place in September 2003 (separately: one with the disability Co-ordinator and Mentor, the other with the diversity Co-ordinator and Coach), which combined the review process with final report planning.

Support and advice was provided during September and October, whilst the Co-ordinators and Coach completed their evaluation reports, with phone calls, e-mails and reading documentation (editing, etc).

The activity took place between October 2002 and October 2003, with periods of intense activity in May/June, September/October 2003.

AAP's other main responsibility was to collect the evidence and information relating to an overview evaluation of the Co-ordinators' roles, which was achieved by reviewing the impact and achievements of the Co-ordinators among a group of stakeholders – members of the Partnership Group; asking the Co-ordinators for feedback on the usefulness of the approach; as well as using observation and questioning of the coach, mentor and co-ordinators.

Range, scope and type of project

Each Co-ordinator has been responsible for developing a series of projects within their sector. These seek to support the national network, through assisting providers of information to develop inclusive services, whilst individual practitioners and organisations have been enabled to share expertise and gain access to services and events.

Each Co-ordinator's programme reflects their experience and expertise, and goes some way to fulfilling their role of bringing knowledge and skills into the network, again, strengthening and supporting CP. As a result, each programme has a different shape and emphasis: the portfolio of disability-related projects was designed to develop an interlocking strategy to increase the services and skills within the CreativePeople network; the diversity programme was influenced by the national skills agenda, the current debate within the cultural diversity sector and up-coming Equality legislation.

Again, each Co-ordinator takes a different approach, which still leads to the outcome that new partners are introduced to the network and that a mutually supportive relationship can develop as a result of pilot and action research projects. The disability projects all operate on the principle that in some way they will need to develop links and partnerships with CP. As a result it is anticipated that knowledge and skills will be exchanged in the process of the work, and in turn will create a greater understanding of disability issues within the network. The diversity projects have a focus on debate and discussion, raising awareness and using events and training to create new partnerships.

The projects are all practical in that they have tangible outputs: an accessible CP portal; new models for DNA delivery that meet the disabled sector's needs more appropriately; a new format for training through the Diversity Intervention; events that profile good practice and introduce potential partners to one another; new partners coming into contact with the CP network and therefore raising awareness and increasing take-up. All of these projects will support professional development within the sector as a whole, as inclusivity benefits every member of a community or group.

However, the projects also take a strategic view – by developing the practical and producing real results, the legacy of the projects will be to lay foundations in the case of IAG for learning disabled arts professionals and to move thinking forward in the case of the BBC/CRE CD-ROM.

The projects that focus on new partners demonstrate the benefits of organisations being part of a network, and the network having partners from diverse and specific groups.

The projects are distinctive in the case of disability in that they frequently make use of the network or existing models for the benefit of arts professionals, and the diversity projects make use of diversity sector expertise within the network, for example the learning event. The network's existence and resources are all used to enable new partners to collaborate, seen through the use of hubs, connections and access to other national initiatives (eg decibel).

The Co-ordinators have brought their experience and expertise to CP, for example the collaborative project for culturally diverse disabled arts professionals; the development of IAG for learning disabled professionals and appropriate DNA models for use by hubs; the pro-active format for the Diversity Intervention and learning event. The Co-ordinators have been able to bring their knowledge to the projects that encourage debate, discussion and raise awareness as well as profiling good practice: both the learning event and the profiling projects seek to harness and celebrate the expertise and good practice already taking place.

The projects are also innovative, either new in the context of the sector or bringing new approaches to the sector: the action learning set is a good example of this. An interesting way of working that has not yet percolated through the mainstream arts sector, and is not at all familiar to the disability sector.

The Co-ordinators' reports outline the projects which are currently underway (or in the case of 2, recently completed), and it is possible to see that the size of the projects vary, according to appropriateness – action learning sets would not be possible in a context of quantity of numbers, whereas the Diversity Intervention has the potential to roll out nationally. Based on the Co-ordinators' reports, the two portfolios of projects would seem to have been well-balanced in terms of size, range and ambition, with a strategic overview to ensure that progress made by the Co-ordinators' work can be sustained and developed further by CP.

The projects are mostly underway, although one or two (Diversity Intervention and decibel portal collaboration) have completed, therefore the detail contained in the Co-ordinators' reports can be considered adequate for the purposes of interim reporting. The reports have followed the P4L principles, with input from AAP, although the final contents, style and presentation of the reports are entirely representative of the individual Co-ordinators.

The following table shows the individual breakdown of project costs:

Project	£ grant
Culturally Diverse Disabled People	£3000
Seminar/Good Practice	£17,000
Models of DNA	£8000
IAG – Learning Disabled Arts Professional	£8500
Action Learning Sets	£6000
Organisational Partnerships/Mentoring	£7500
Diversity Intervention Training Pilot	£14,500
Introducing New Partners:	
Chinese Arts Centre;	£7,500
Akademi;	£5,000
Kuumba	£5,000
Learning Event	£10,000 (£20,000 projected income)
Strategic Portal Investment	£10, 000 (income)
Disability & Diversity Collaboration	£3,000
Cd Rom	£5,000
	£100,000

Findings

This section reports on the consultants' findings, relating to the impact and effectiveness of the NAP investment, under key headings:

* Infrastructure – Creative People and the funding system

* Co-ordinators' portfolios of work

* Co-ordinator and coach/mentor role

* Self-evaluation process

These findings are made up from feedback and responses from contacts supplied by the co-ordinators, members of the partnership group and hubs, co-ordinators, coach and mentor.

The consultants have observed the phenomenon of not reporting on 'bad news' in the past, and it seemed to happen in the case of gathering feedback. Constructive but honest feedback about failings and concerns was not expressed formally, although it was clear from discussions and conversations with the consultants that there had been a number of clashes and challenges over different things.

Apart from being a lost opportunity to use the evaluation process to mediate and broker this, and improve understanding and clarity, this reluctance seemed to be a concern that any perceived criticism would be entirely destructive to the roles and network.

Therefore it is important to note that the findings overall, are very positive in terms of the usefulness and effectiveness of the co-ordinator roles and the support roles of coach and mentor. Most issues relate entirely to the particular context of Creative People, the funding system and the newness of the roles, as discussed below.

Context

AAP believe it is important to set the findings from this work into context. CP itself is a relatively new organisation and, virtual or not, is going through the same period of settling in, refining goals, establishing effective management structures, establishing clarity and communication channels, etc (as shown by the responses to the review questions) as any other new organisation. The co-ordinators were appointed to their post after the initial setting up of the network – NAP funding made the posts and budgets possible, and so this was an additional bonus to the network in terms of new resources and opportunities to develop projects. However, this inevitably led to an issue of integration when the co-ordinators began their work, as would be in the case of other appointments made within this context.

Moreover, the roles, embedded in a new organisation, were also completely new and therefore required the building of a framework for operation, influence and activity as the work progressed. Whilst this risk-taking is an inherent feature of projects funded by NAP (which has restored the right to fail, balanced with an understanding of why and how to improve), placing it within a high profile and equally innovative network obviously made the entire venture an extremely high risk undertaking, with the attendant anxieties about 'success' and 'failure'. The level of funding, whilst entirely realistic in order to support two posts and a small number of meaningful projects, was significant in the resources it added to CP, who has one full time project manager, and might therefore have raised expectations of any individuals who took the post.

Both CP and NAP are schemes that have been conceived and created by the funding system – they are active attempts to address significant national issues; it is perhaps inevitable that there would be what some call an overly bureaucratic approach and structure, particularly when the schemes are high profile, high risk (perceived as such because innovative or responding to need) and regarded as high cost in some quarters.

Therefore these findings should be considered in a general context of having been an active experiment, discovering the tools, knowledge, experience, support and personal resources that are required to support the development of inclusive services for CP (including the recruitment, line management and support for the roles).

> *'To my knowledge, the Coach and Co-ordinator relationship/support mechanism is unprecedented for personnel within the Cultural Diversity sector as part of the funding system or host organisations for the posts such as the CreativePeople Cultural Diversity Co-ordinator.'*

Since the role and support, and approaches were all untested on this scale, any outcomes are valuable learning experiences for the individual, organisations involved and the system which is responsible for developing policy and funding.

Infrastructure

CreativePeople

It is not within the consultants' remit for this report to comment in great detail on the CP structure and setting up of the network. The network generally seemed supportive of the roles and individuals, and certainly valued the contribution made by the co-ordinators, although it is clear that there was an issue of ownership relating to the roles and budgets: ACE funded and appointed, but Creative People retained ultimate responsibility. It is possible that the historic

possibility of having disability and cultural diversity hubs rather than co-ordinators may have contributed to the consequent issues of clarity and communication.

> *'Feels like ACE initiative compared with rest of CP which has developed from bottom up.'*
>
> *'Each co-ordinator had a steering group – they were selected by ACE rather than CP. Felt a bit ACE driven rather than integrated – they got over this with time.'*
>
> *'If they operate solely as part of the CreativePeople network (and I don't know whether or not this is the case), then the proportion of funds allocated to them would seem to be extremely generous. CreativePeople (with only one freelance member of staff supporting the entire network) is obviously powerless to act in any sense as 'line manager'; therefore these issues would seem to be beyond our remit.'*

Although this issue might have eased with time, the fact that the Chair of the Partnership Group has not responded to requests for feedback (despite having changes made to the questions), remains indicative of an attitude seen by others as not taking responsibility:

> *'Creative People has a responsibility to work with the co-ordinators and have criteria for selection, and guidelines, on how to make it work.'*
>
> *'There is a strong sense that CreativePeople do not feel that they have ownership of the Co-ordinator role, as the co-ordinator is employed by Arts Council England'*

Another key issue was that of clarity of purpose, although it is clear that this has been recognised and is being addressed:

> *'There has not always been absolute clarity about the initiatives on which they are embarked.'*
>
> *'Everyone involved probably needs a rather clearer sense of the strategy: exactly what is being done, for whom, and why. The CreativePeople network itself suffered from this lack of clarity but has now defined its future very precisely. The work of the co-ordinators needs similarly refining.'*
>
> *'The particular areas of work we are talking about can otherwise fall prey to a different kind of 'laissez faire' – everyone assuming it is 'a good thing' and not being rigorous enough about its specific aims and objectives.'*

Another significant issue that came up was that of communication – closely linked to the perceived lack of clarity in the first year:

> *'[It's] not easy to broker conversations to shape the content of the programme of projects they've put forward … meetings aren't effective forum for discussion and debate... the paperwork beforehand is a mess. Lots of people don't contribute – 15 people attend, about 5 people speak.'*

> *'…terminology has sometimes been a problem: they are so thoroughly engaged with their particular constituencies that they do not perhaps realize that some terms and/or issues are not readily grasped by others.'*

These issues combined to create a feeling that:

> *'Structure is very complex – who are they working to? No protocols to take action if you have a concern'*

> *'Are the structures the right ones to support and shape the programme of work?'*

> *'Integrating the work of Sue and Shahid's projects into the main practice of Creative People [has been challenging]. When people become uncomfortable with issues on occasion this leads to resentment towards Sue and Shahid which is sometimes destructive.'*

Conversely, the unique positioning of the co-ordinators was seen by some to be a positive advantage:

> *'The dual CreativePeople/Arts Council identity of the Co-ordinator provided opportunities to switch identities and open doors that would normally have remained closed with a single identity.'*

Of more concern is the feedback that awareness needs to be raised:

> *'The majority of hubs do not understand the term inclusion, particularly in the context of the hub partnerships'*

> *'There is an absence of national networking taking place in relation to disability and professional development'*

Although integration was an issue at the start – and perhaps just a natural consequence of having two roles placed after the initial inception of the network, it would seem that integration has begun through the co-ordinators' activities and presence:

> *'The disability working group that Sue established has met regularly and has involved people from across the network in real discussions about how we can all begin to address the issues faced by disabled people. There is real commitment by the members and extremely useful exchange that is moving the network forward whilst still operating within the reality that we are all at different stages.'*

The roles added greatly to the network through their integration within the framework, bringing expertise and knowledge into CP and the activities that have been devised as a result of their involvement:

> *'Got everyone talking about diversity and disability.' Made diversity and disability high on everyone's agenda. Increased knowledge of these areas. Expanded comfort zones. Increased contact with diversity and disability organisations and initiatives. Increased and improved contact with ACE initiatives. Increased awareness of New Audiences activities.'*

The fact that CP now has a finished business plan for the next three years and has made changes to the structure and format of the Partnership Group suggests that many of these concerns were to some extent a natural part of the development of a new organisation: it is clear from the comments received, particularly about making change, that there is a desire to build positively on this first year, with a keen awareness of the need for sustainability:

> *'The challenge will be how to ensure that the initiatives they have established during the past year can provide sustainable bridges to, and relationships with creative people and their constituencies. The test will be to see that all our IAG services are not only accessible in the simplest sense but actually being used. It will be a measure of their success if the different parts of the network have gained from them the guidance and expertise to truly connect with and be used by disabled and culturally diverse practitioners. In other words not just saying the right things, but doing them.'*

The larger infrastructure

The infrastructure also needs to support the development of individuals within specific minority groups – the creation of these roles was clearly a response to the knowledge that:

> *'There is a need to develop more opportunities for disabled arts managers/practitioners to progress in their chosen field once they have reached a specific level. There is lots of anecdotal evidence of disabled people not developing their careers for fear of not getting their support needs met by new employers.'*
>
> *'The sector is so dependent on individuals and yet there is a ceiling of professional development that the sector can offer its colleagues, and then they go…'*
>
> *'Building the capacity of disabled people working in the disability arts admin and leadership is being overlooked. We have a real shortage of new people coming up to take jobs in the field. I think CreativePeople could do more to develop this.'*

Overall, it can be said that the co-ordinator roles have made a positive and strategic start on addressing the capacity issue in year one through their projects. The decision to create and embed key, specific roles within a national network that has an infrastructure is effective, as long as there is clarity about the financial and management relationships, including line management, reporting lines and communication channels, preferably in advance or at the same time as the recruitment and appointment of individuals.

Co-ordinators' portfolios of work

The consultants have been able to gather information and make various observations as a result of meetings, documentation provided about CP (although this has been minimal), discussions and an assessment of the project outlines, taken together with their knowledge of the funding system, disability and cultural diversity issues (on a broad basis) and NAP. However, the general consensus in terms of what the Co-ordinators' work has achieved is as follows:

> *'Both Coordinators in their very different ways and with very different sectors, infrastructures and issues to deal with have done two things essential to the success of creative people:*
>
>   1. *Engaged the network in the issues of disability and diversity*
>   2. *Engaged disability and culturally diverse arts organisations in the work of creative people'*

The portfolios represent a balance of strategic and collaborative activities, events and action research projects or interventions, yet they are practical in delivery. The projects all focus on the aims and objectives of CP and in fulfilling the Co-ordinators' role and remit; several are innovative, either in the particular group included, or in the method used. It is noticeable that several have clearly departed from the usual 'equality training' approach, in a deliberate and strategic attempt to explore new and possibly more effective ways of raising awareness of issues and supporting inclusive professional development opportunities.

Projects have been linked to the structure and resources of CP, bringing new partners to the network, whilst also demonstrating through practical means (grants, opportunities to take up learning, action research, events) the value of being within a network. This should be beneficial to the development of the network, building credibility, trust and awareness amongst the disability and cultural diversity sectors.

The projects generally show a good standard of project management, although some projects are more clearly defined than others. This is more due to their nature, such as the creation of a network for culturally diverse disabled practitioners, than because of a lack of planning or

direction. Projects have been conceived as action research, which seems a particularly effective way of exploring new approaches in a constructive and structured environment. This supports the discovery of what does and doesn't work, instead of having a 'fail/success' and leads to a more transparent record of a project. However, the action research has not had a deleterious effect on practical outcomes and outputs, with guidelines, toolkits, etc to support learning. Again, these projects are progressing successfully, and there is no reason why they should not have a good chance of achieving their objectives (which are also realistic).

There were concerns about how defined some projects are (at the time of writing):

> 'I feel that there is perhaps a lack of detail in the documentation (and therefore my detailed understanding) of the various specific initiatives on which they are embarked.'

> 'Some extremely good stand alone projects but sometimes their context within the wider CreativePeople development is not understood or accepted.'

> 'I am not convinced that [the co-ordinator] has a clear idea of how to go about doing this; hence [the] tendency to waffle a bit. It will be interesting to see what tangible outcomes arise from the projects that he is developing - at the moment they seem quite abstract.'

However, both co-ordinators' reports contain details of the projects which might not have been presented to the Partnership Group in this format before, and taking into account the fact that they are in progress, the disability portfolio in particular has been clearly outlined and described.

It is fair to say that the portfolio of work will support CP in terms of future development, as the projects should bring new partners, skills and knowledge within the network, as well as supporting professional development through newly gained knowledge and experience. These projects would also form the basis for a valuable dissemination programme, to raise awareness and improve practice throughout the sector as a whole:

> 'CD training gave me an exposure to CD in the arts like no other and was extremely useful. It also gave me an opportunity to have discussion with people working in cultural diversity to look at the connections between it and disability culture. The co-ordinator has given disability arts a CPD IAG focus that it has not had before.'

> 'I feel included by both of them in their thinking, planning and delivery. At this stage they are only part way through their programmes - it will be the stage after that which will demonstrate a more coherent approach to participation and collaboration.'

Co-ordinator roles

The consultants consider it essential to separate the individual from the post-holder when considering the effectiveness and achievements of the co-ordinator roles. The points raised are not about individuals, although the very positive feedback about the disability co-ordinator in particular, suggests that there are areas of expertise and levels of operation and experience that are required in an individual to fulfil the role effectively. These comments highlight some of the skills required of the post:

> *'Patient, non-judgemental style, expertise – in tandem with acceptance of co-learning process, high standards, good role models, ability to operate at senior levels, approachable, accessible, pro-active communications'*
>
> *'Both co-ordinators are very approachable, and passionate about their particular work. Both these qualities are very important in engaging the attention of organizations who might otherwise feel that a particular social agenda is being imposed on their own work.'*
>
> *'They bring new thinking and are assisting working in disability arts and cultural diversity to contribute to the broadening of mainstream practice.'*

The co-ordinator roles had a lot of expectations to fulfil from the outset in terms of being a pilot project with a significant investment, taking place in a relatively new organisation, based on networks and partnership working – which require time to develop trust and effective working relationships and methods. In that sense, having devised a complete portfolio of projects is a remarkable achievement in itself.

The responses suggest that the co-ordinators have supported the development of the network, and this is generally recognised as being an achievement:

> *'[It's the] knowledge that expert advice is to hand. A sense that the network is well-advised, 'on course' in terms of addressing issues and engaging with a wider range of artists.'*
>
> *'They have taken different approaches. What is consistent, however, is that they are bringing people who have no need to engage with creative people into the fold, building trust that ultimately CreativePeople will be of value to disabled and culturally diverse artists, and reinforcing the message that if we want to be of value we need to go the people who know best.'*

The feedback gathered suggests that creating a co-ordinator role with a clear remit for strengthening the network and, most important, a working budget is an effective way to enable

individuals and organisations to deliver policy in a practical way, whilst also creating an upward cascade of evaluation and information about this approach to support policy development:

> *'… the semi-independent status of the coordinators (not employed by CreativePeople) has been essential. Yes, they have raised hackles and flung down the odd conceptual gauntlet, but having the freedom and the organisational backing to do this has given them a clout beyond the reach of any individual employed by a hub'*

The co-ordinators were able to make use of existing networks with CP, ACE and those they brought to the role. The co-ordinators' contribution and 'value' are clearly supported by the feedback:

> *' [They] built bridges to organisations not involved in the CreativePeople pilot; made key introductions and helped build relationships; brought new people into the Management Group and Working Groups.'*

One of the expectations – that of reaching everyone in a national, cross artform network in a short time - placed on the co-ordinators was recognised by some of the respondents:

> *'They've had such a big job therefore spread rather thinly'*

Other respondents were critical of the reach and demands placed on partners and members of the management group; these comments have more to do with structural and political issues than the actual achievements of the co-ordinators. The co-ordinators, though, were aware of this concern:

> *'[Next time, there should be] more discussion with the CreativePeople Management Group and Chair about the ways in which the Co-ordinator would operate within the network, and to establish a greater sense of their expectations/aspirations for the role. In retrospect the length of time it had taken to appoint the co-ordinator had meant that all involved were anxious for the work to progress quickly, and thus vital preliminary discussions were missed.'*

In fact, it is clear from the disability co-ordinator's report that there was a clear briefing and project development process that informed the aims and objectives of each project, as well as the resources brought to the post.

> *The prior knowledge and experience of the co-coordinator obviously has a strong influence on the way in which the subject is approached and perceived. Key interests, knowledge and themes which have influenced the development of this role are:-*

1. *A strong interest in the process of culture change, especially managing change across different cultures within one organisation.*

2. *A consistent re-affirmation (experienced in different roles) that training and education (of disabled people), are fundamental to the inclusion of disabled people in the arts.*

3. *A strong history and commitment to the disability arts sector and its development.*

4. *Experience as an information, advice and guidance provider, and an understanding of how the process of IAG relates to disabled people.*

5. *An interest in exploring new ways of working within a network.*

6. *A commitment to inclusion and equality.*

However, it would seem to the consultants, together with the feedback gathered, that there was an assumption that individuals would come equipped for every aspect of the role, when in fact there was an acknowledged lack of clarity from the partnership group, and it was a pilot project. The potential impact of the roles and what could be achieved therefore became reliant on the personal resources of the individuals, when those required resources might not have been obvious at the start of the process. It is possible that the roles require a baseline of skills and knowledge that are different to those identified before the co-ordinators took up their posts, now that there is a greater understanding of the potential reach and amount of activity. The disability co-ordinator outlines some of these in her report (Part 3):

Developing any initiative based on increasing inclusion of any group or issue requires a diverse range of resources or the development of resources prior to engaging in the subject. The following were identified as essential to undertake the role (by the co-ordinator):-

1. *Knowledge of the disability arts sector and political landscape.*

2. *An understanding of the difficulties that are likely to occur, and an acceptance that the role will be difficult*

3. *An understanding of IAG and its' processes.*

4. *A mentor and support structures for the role.*

The support structures in place for the co-ordinators were therefore of great importance in terms of supporting success. The co-ordinators have both commented on their support during the process:

> *'The mentor role has been invaluable in providing essential functions to support the co-ordinator role and enhance its' effectiveness.'*
>
> *'The coach is a key relationship, assisting the co-ordinator to acclimatise when the post first began and to come to grips with the complicated framework around the task at hand.'*

This is discussed in more detail in the next section (below).

This report reviews the first year of a two year project in one respect – the use of co-ordinators. The co-ordinators have clearly demonstrated the capacity and ability to initiate a series of useful and relevant projects, suggesting that the roles in themselves are effective ways of delivering policy. Only a full evaluation at the end of the two year period, with a clear brief for reporting, will be able to assess the long term and strategic impact of these roles:

> *'[We have learned] that trust, understanding and real progress - on a national cross-artform level - are all achievable but on an inevitably slow basis. And you don't gain greater speed by cutting corners. There are a lot of people involved, all with valuable if different levels of experience and expertise. All their views and voices are important in planning the way forward. Sue and Shahid's work is effective when based on consulting the sector (inside and out of the current CreativePeople network)'*

Coach and mentor roles

there were two main reasons for the coach and mentor roles:

*   To support the co-ordinator post, given the complex situations within which the co-ordinator would work and the competing agendas of the numerous factions involved in the work.

*   To test the viability/usefulness of a coach or mentor for people working in the arts.

Coach

Both co-ordinators originally had a coach assigned to them, prior to appointment. For access and geographical reasons, the disability co-ordinator instead requested support in the form of mentoring.

> *Coach and Co-ordinator were given to each other i.e.: only met at first meeting. There was some indication of Coach being on the interview panel but no clarity re: no appropriateness or constructing a way that a meeting could be accommodated before the relationship began. We were fortunate that we both were committed and*

felt able to make it work but it is a point of debate in terms of how best to broker this relationship.

These roles were both completely different in goals, style and nature, and evolved as unique relationships. There are a number of points about the impact and requirements of each role, however, which are outlined below, with suggestions for improvement and change in the Recommendations.

A traditional coach supports and encourages an individual to improve and achieve their potential, usually in a very specific area. The new phenomenon of life coaching concentrates on a person's whole life. In this case, the coach used all of her professional skills to encourage the development of the co-ordinator in a very specific field – cultural diversity within the subsidised arts sector.

The Coach was appointed before the co-ordinator was in post and had a clear brief (attached). This included: induction; general advice, information and contacts; supporting the co-ordinator to develop work plan (involving guidance and advocacy; capacity building; research and a DNA for the co-ordinator). Furthermore the coach agreed to assist the co-coordinator with reporting to line managers; keep a diary and record of co-ordinator's progress; quarterly reports to line managers and NAP lead officer; to be available for supported self-evaluation input.

Taking feedback and discussions into account, it can be said that the coach role, put in place to support the cultural diversity co-ordinator, has been very successful in its first year, in assisting the co-ordinator move towards his aims and objectives and fulfilling the brief given. The coach has clearly reported back on the process and aims outlined in her brief and demonstrated that she has fulfilled the role in every way, and added considerably with her informed contributions. The brief and subsequent reporting has provided invaluable information, not only for improving the second year's activity, but also for developing a model for the coach role in other situations.

Similarly, any challenges are informative in shaping future roles, and have led to a number of recommendations in this report. These were around clarity and communication in the following areas:

* The line management for the co-ordinator changed in March 2003 and is due to change again (at the time of writing in October 2003). This combined with the un-identified status of the coach in management terms –

    'The reality of having the funding system undergoing internal staff changes and dealing with their own professional upheavals has had a knock-on-effect that is continuing. There has consequently never been a satisfactory two-way process for

the Coach role in terms of ACE-N, especially in the hope of being provided with a regular flow of useful information. The term 'line manager' was therefore unhelpful, not only as it set up expectations that could not be fulfilled but was also as an anomaly in assisting the actual role being carried out.'

'…since there is no clear precedent for this particular position, it has meant that each step has thrown up issues and perceptions that were not necessarily foreseen or accounted for… this has come about most acutely through the 'too-many-cooks' syndrome: ACE-N = Cultural Diversity Officer/Line Manager; Education & Employment; New Audiences; and CreativePeople Management group; Steering Group for Co-ordinator; Coach and working alongside the Disability Co-ordinator.'

* The administration within the funding system also caused problems and delays with enquiries and requests for information. The co-ordinators were made responsible for paying and contracting the coach and mentor, something generally agreed to be neither satisfactory nor appropriate, and combined with the other internal changes to cause late payments, contracting, etc:

'I am disappointed that my contract was not actually delivered till 20 June 2003 having been promised by March 31 2003 (almost a re-run of the delays encountered with the contract for Year 1) and that I was only informed of administrative changes re: liaison about my contract and payments having had to chase them up.'

* Communication was clearly an issue throughout the first year; whilst this might be expected to some extent in such a complicated structure, with so many stakeholders, there does not seem to have been much response to the coach's requests to address this:

'Given the Coach role is an isolated one, and is to some extent reliant on information from line manager or lead contacts in conjunction with the Co-ordinator, the customer-care aspect has been somewhat lacking despite best intentions. It is hoped this will improve in Year 2.'

* The potential for the role to be isolated was not helped by the fact that the disability co-ordinator and mentor could not be persuaded to share a joint meeting, with a joint agenda, arguing that the issues were too divergent to make a mutually productive session. Initially the coach might have expected to share the experience with the other coach (disability), but due to access needs and geography, this role changed to a mentor – something that was probably too dissimilar in scope and style to generate useful information exchanges.

*'The **'who- does-what'** list never materialised as a **communication tool** for the Co-ordinators and Coaches.'*

The way in which the challenges above were addressed (or not) is important in terms of supporting the coach as they carry out their role; suggestions for improving this are included in the recommendations section.

Mentor

Mentoring is an entirely different relationship from coaching, based much more on personal relationships and offering an objective and safe environment for an individual to work through ideas, challenges and plans. The nature of mentoring, and the issues around reporting make it more difficult to assess (in terms of tangible outputs) the success of using such a support role.

> *'The structure of the framework for this mentor relationship was set simply by virtue of having a person, an external view, a supporter at the end of the e mail line or in a meeting place. Having to communicate to this person provided all that initially is needed for reflective and supported time to be experienced.'*

The mentor, who was chosen by the co-ordinator, started four months into the co-ordinator's contract. The role in this case was deliberately not constrained, and very much negotiated between the co-ordinator and mentor, so as not to 'force' any conclusions about the pilot, but the factors that contributed to the success of this relationship and therefore the role seem to include:

* Choice: the co-ordinator was able to meet and select the mentor

* Consistency of support: achieved with short regular meetings and regular email contact

* Agreement: between mentee and mentor with regards to the remit of the job description

* Experience: the mentor has experience of working within the arts funding system and the disability arts sector and understands the issues and complexities of both areas

* Understanding: mentee and mentor are clear about the parameters of the relationship

* Respect and trust: held mutually

* Commitment: by the mentor and mentee in making the partnership successful

The co-ordinator has identified the 'value' of the role:

> 1. *Space to discuss the wider context of the work and its implications that in other circumstances would not arise with colleagues.*
>
> 2. *Validation of assessment of the political landscape.*
>
> 3. *Encouragement and support to deal with hostile and challenging situations.*
>
> 4. *Objective comment on the work developed.*

In addition, they have identified a number of key issues specific to the co-ordinator role and context, which act as warning signs for future development of such roles, as they can change the balance of the work and change the nature of the relationship:

* Avoiding the replication of the line management structure

* The need for the mentor to invest **themselves** [?] in the process rather than the outputs of the co-ordinator.

* The success of the mentor should not be judged by the success of the mentee

* Confidentiality issues around reporting back on the process that can be challenging

* Meeting access requirements when both the mentee and mentor are disabled can be an issue – who should take responsibility?

The mentor role seems to have been effective in supporting the co-ordinator; it is still a new tool for professional development; it would seem to have potential for development and use as part of a peripatetic approach to supporting and funding projects and organisations:

> *How do you know if you're being a good mentor?*
>
> *'The answer as I see it is – you don't – every experience provides an opportunity for learning so how can a mentee or a mentor fail? It's possible that a failing could be a premature termination of the arrangement. Having said that, the mentee appears to me to be quite considerably more 'comfortable' and confident, productive and effective within her work.'*

In conclusion, the feedback gathered about both these roles suggests that:

> *'… this project has shown that whilst mentoring is vital, we need to develop more mentors from diversity backgrounds. The people with the right experience and skills are often overloaded with work, but if key bodies in the sector (eg ACE) are serious about development at senior levels, they will free suitable staff up and support them in developing mentor/coaching skills'*

Self-evaluation process

AAP gave the same time, documentation and resources, and offered the same access by phone, e-mail and meetings to each co-ordinator (as outlined in description of activity). Obviously each individual took their own approach to self-evaluation, although this was within the framework of P4L. Both co-ordinators were encouraged to develop their own outline and

style that would communicate their achievements clearly and appropriately to readers. AAP made suggestions, gave advice and edited, but did not impose any re-writing.

The process of supported self-evaluation (AAP's main task) has produced the co-ordinators' reports, which are recommended as resources and reference materials for the coach, mentor, line managers and partners, as well as the co-ordinators. One co-ordinator has reported that the process has encouraged her to integrate evaluation on a continual basis and:

> *"As a result of the evaluation and report writing process I have been able to initiate new work and new strategies. The process of reflection has provided new opportunities to progress the work - everyone should have to do this."*

The disability co-ordinator's report was planned in outline in advance of writing; she used the outline to assist with the collection and analysis of the information she gathered. Most importantly, the structure enabled the co-ordinator to reflect upon the role and her work in the first year and report clearly. The co-ordinator understood the process, used the available resources (including the mentor and AAP) and invested time and thought to the written report. Feedback suggests that when support is used effectively, it is valuable:

> *'AAP has a fresh approach to what some see as the dull chore of evaluation! A real commitment and integrity was evident throughout the whole process, and a strong reassurance that the end product would be "fit for purpose" (and they were right). The key elements which I feel made it useful were:-*
>
> - *Fresh approach*
> - *Support to evaluate a wider context from a personal perspective.*
> - *Thorough understanding (by AAP) of the evaluation process and approaches available.*
> - *Commitment from AAP*
> - *Opportunity to take meetings away from work environment*
> - *and finally AAP were knowledgeable, flexible, friendly and supportive.'*

The cultural diversity co-ordinator had an outline of ideas and appeared to work through the same process. However, a (pre-planned) period of activity and events clashed with the time required to reflect and write the review report, although deadlines had been negotiated in agreement with the co-ordinator. This led to a delay and followed by a period of intensive activity with AAP assisting the co-ordinator. This consisted of a suggested re-working to draft a coherent and consistent report that would demonstrate the achievements, effectiveness and

value of the role and work undertaken; extensive phone calls; long e-mails; reading and commenting on three drafts in a four day period.

AAP have noted the co-ordinator's comments, particularly around preferring support with the actual report-writing, which seem to suggest that the concept of SELF-evaluation has not integrated itself within his working practice:

'Focus on structure & report writing not ideas'

The premise of supported self-evaluation is participation and willingness to work collaboratively through a process, with individually negotiated forms of support. Support cannot be forced and guidance can only ever be that – guidance. If minimum standards of practice (including reporting, project management, etc) were built into the funding/support agreement, then the process of evaluation would have a framework to work with, and the support for self-evaluation would become a quantifiable resource which is flexible and responsive to those self-evaluating projects/initiatives.

Part 2: Conclusions and Recommendations

Conclusions

The findings of the interim evaluation of the Co-ordinator roles on the peripatetic roles undertaken by the Co-ordinators, Coach, Mentor and evaluators

*   Offer new ways and effective ways of funding and supporting organisations and projects on a broader basis, that is more individually tailored to specific identified needs and areas for improvement/development

*   Could be an effective way for a streamlined and strategic funding system to develop and manage new working relationships with clients through appropriate and clearly defined deployment of existing human resources and expertise

*   Suggest that the processes of evaluation and auditing should be separated out, to ensure transparency of evaluation and outcomes, alongside accurate and adequate accounting of activity and spend

*   Encourages the production of more relevant and strategically/tactically valuable information on an ongoing basis which strengthens project delivery through informed decision-making process

*   Indicates that using the expertise of a team or grouping of specialist practitioners is an effective way (in terms of development and improved practice as well as cost) of:
    5. enhancing resources and capacity with benefits for individual projects or schemes (project management, quality and usefulness of evaluation)
    6. integrating CPD within projects and organisations to benefit the individual (and sector).

Recommendations

AAP were commissioned to make recommendations in relation to evaluation support and processes for CreativePeople in the 2nd Year. However, there are a number of recommendations that have come from the constituent group, relating to the infrastructure and organisation of the roles that are important and will impact on any future evaluation of the co-ordinators and indeed CreativePeople as a whole:

* There is no sense of a clear exit strategy or legacy for the co-ordinators; there is the possibility that their work will exist in a vacuum after 2004 if CP does not wholeheartedly support this initial progress. Exit planning needs to start as soon as possible.

> *'What needs to happen during this year is that the lessons we have learnt from their pilot programmes are integrated not only into the core group of partners but assist in the development of improved practice across the arts. This will not be achieved by them alone but only if they are wholly perceived by everyone to be part of our solutions.'*

* This overview looked at the Creative People co-ordinators only, which is not the same as an ongoing evaluation of the network. The issues coming up from the overview suggest that there is an urgent need to build on the business plan by developing an evaluation plan for Creative People as a whole and putting it into action straightaway.

> *'[What we need to improve is…] A working portal; a revised management group (including new Chair) that focuses on delivery rather than politics'*

* There is recognition that planning for the end of the pilot should take place, but it is recommended that this is acted upon as a matter of priority, together with an evaluation framework. CP Partnership Group, the co-ordinators, coach/mentor and ACE should use the planning process to resolve the issue of ownership referred to in the findings, by clarifying the position of the co-ordinators and establishing the remit of both CP and ACE with respect to these roles.

> *'Everyone involved probably needs a rather clearer sense of the strategy: exactly what is being done, for whom, and why.'*
>
> *'Year 2 will have to be about action to make the role credible beyond the first year.'*

Recommendations relating to the co-ordinator roles include:

* The recruitment and selection of future co-ordinators should not have to run simultaneously; this placed expectations on individuals to work collaboratively from the outset, regardless of focus or appropriateness of that; the fixed timeline for the co-ordinators' contracts created more pressure to deliver the same amount of activity within a shorter time period, with the inevitable 'concertina' effect.

* Contracts for co-ordinators should be for a minimum two year period, to allow for solid induction, familiarisation, consultation, project development and delivery with a working budget to implement projects and the same support structures.

* The co-ordinators and coach/mentor should have more choice and control over the pairing process and an annual review should ensure that the support roles adapt to the co-ordinator's rate of progress, look at changes that need implementing and issues that need addressing. The most effective point for this would be after this evaluation process, to assist planning for year 2.

* The co-ordinators should have access to support for the completion of the self-evaluation until the completion of the contracts in 2004 to provide professional development and ensure high standards of reporting.

Recommendations relating to the coach/mentor roles include:

* The administrative functions in relation to the Coach should be kept separate from the Co-ordinator, and kept as consistent as possible. The Coach and Co-ordinator should be asked before changes are implemented.

* Support and professional development needs for the coach and mentor roles should be considered as part of the 'package', alongside the support for the co-coordinators and reporting process.

* CP and ACE should consider ways in which they can build up a 'pool' of mentors/coaches from different areas of expertise and specific groups to ensure that the support exists in the future and is not reliant on a small group of individuals.

* CP and ACE need to establish a clear line of responsibility for the coach – it is inappropriate to think of the role as being line managed by the co-ordinator's manager, as the coach or mentor is usually operating at a peer level with senior management: Lead Contact is a more relevant and accurate title.

* Together with clarity and consistency about line management and the related brief, the coach and mentor roles would benefit from a clear communication structure, such as the 'Who does what, why' document referred to by the coach.

* Evaluation should be built in as a core part of the brief with appropriate days allocated for the coach/mentor and co-ordinator roles.

> *We all want it to be successful, and sector to benefit!*

Part 3: Co-ordinators' reports & appendices

This part of the report contains the individual co-ordinators' reports and appendices, written independently, with the support of AAP throughout the self-evaluation process.

The appendices relate to documentation produced to assist the co-ordinators in planning their evaluation plan and reporting.

The reports have been attached as separate documents, to make them accessible as individual stand-alone reports.

Appendix 1: an introduction to documentation

As Co-ordinators, you will be responsible for the evaluation of projects, as well as having an opportunity to find how self-evaluation can infomr and support your own continuing professional development.

Getting involved with evaluation is a great way to help you improve project planning and delivery. It should not result in lots of extra work for you. There may still be people – or parts of your organisation – that think 'it's just additional work, why bother?' We thought it might be useful to answer that simple and understandable question.

We believe that simple approaches, tailored for each organisation and situation, will help you to measure and record your project's progress and outcomes as an integral part of the project management process. On an individual level, self-evaluation will enable you to obtain the most from experiences, and put lessons learned into future practice.

Most funded projects require 'evaluation' and reporting. This fulfils a number of functions for funders: to monitor, to build up the case for public or trust funding of the arts, and to acquire evidence to support advocacy promoting the effectiveness of that funding. Too often, it is perceived as:

1.   Onerous, because there's always a form to fill in

2.   Unnecessary, except to unlock the last percentage of funding

3.   Additional work that has to be squeezed in at the end of the project

4.   Potentially dangerous, as it can be judgemental and a way of 'policing' arts organisations

Whatever your feelings about evaluation, it is clear to most practitioners that evaluation is here to stay, so we might as well learn to deal with it effectively. This is an invitation for you to try a different approach.

There is another way of looking at evaluation. It can provide a way of recording, reporting and reflecting on what happened, what worked and why, and should be:

*   A way of showing how you and the organisation has improved your practice and understanding through a project

*   A valid and equal part of the creative process, enabling participants, attenders and artists to contribute and feedback on how the project worked for them, as well as you

*   Of practical help to you and your organisation for running a project in real time, because you know what the progress has been, and can make changes on an informed basis

* A decision-making tool when it comes to planning future activity (or trying something new/different)

* Useful when identifying funding sources, as you are able to demonstrate a track record or a need for support in new areas

* A resource for you and the organisation in the future when you are planning other audience development activity

* An archive and resource for publicity, funding and advocacy purposes, because you have a variety of methods, showing success and results

* A grass-roots tool for influencing policy-making and funding decisions, because you are able to demonstrate what works at an organisational/attender/participant level
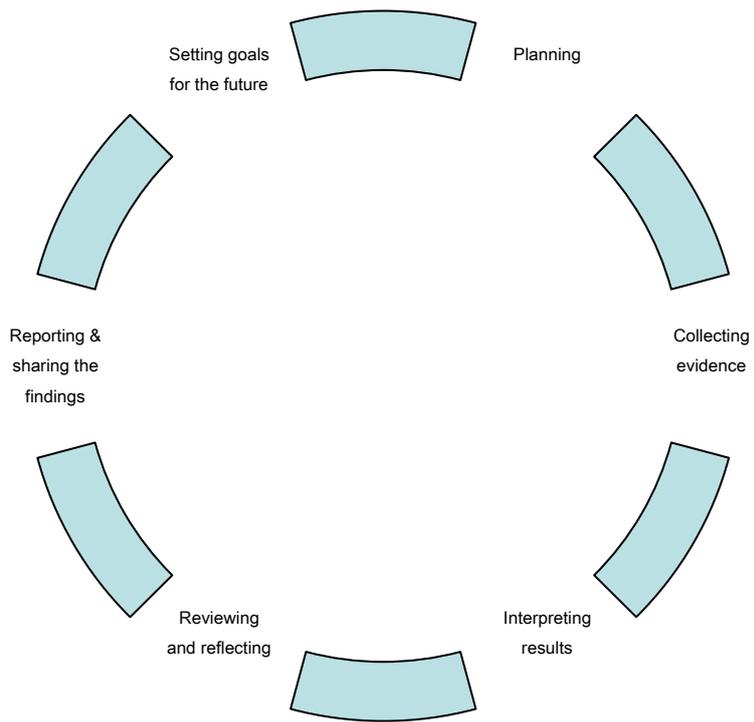
Six Steps

The process takes six stages, with milestones agreed by the organisation (or team, or co-ordinator) to review and assess progress. The advantages of integrating this process within the project management are:

* The team is fully up to date with project progress, and allows for better communication

* Potential issues are identified before they become concerns or problems and allow the project to be flexible in order to achieve the aims and objectives, rather than operating within a rigid framework (this can be more effective in time, resources and costs, too, as late and expensive mistakes can be avoided)

* The project is a living advocacy tool, because the team is knowledgable about progress and funders, supporters, potential sponsors and partners can be communicated with – particularly if there are particularly successful approaches emerging during the project

* It is considerably easier to collect evidence to use in the analysis, findings and conclusions if this is done on an ongoing basis, according to previously agreed needs and uses

This approach is based on Felicity Woolf's publication *Partnerships for Learning*, which was commissioned by the RABs and Arts Council of England; it has been adopted as the industry standard, and therefore applies as the basic approach for both New Audiences projects and other funded projects. However, the process is made into a continuous cycle by using a final stage to begin and inform the planning process of the next stage, project or cycle.

Setting goals
for the future

Planning

Reporting &
sharing the
findings

Collecting
evidence

Reviewing
and reflecting

Interpreting
results

What do we need to do first?

The key to success is effective planning at the start of the project process. Asking these questions can help:

1. Why are we doing this project?
2. What specific things do we want to achieve through the project?
3. How will we go about doing these things?
4. Who will be involved?
5. When and where will it happen?
6. What resources (people, time, spaces, materials) will we need for this project?
7. What is 'success' for this project?
8. How will we know if the project has been successful?
9. What will we use to show what has happened?

These questions can also be tailored to meet individual's aims and objectives, in terms of continuing professional development and improving practice – it can work for artists, managers, team workers and participants.

The answers will give you an outline, but you also need to think about how you will go about recording and assessing the project, so that you know what happened and how you will use it or devleop as a result.

This does not have to be worked out in detail, but it will ensure that you are able to evaluate the proejct effectively if you ask these questions at the planning stage, too:

1. Who has overall responsibility for evaluating the project?
2. Who else will be involved in collecting evidence?
3. How much is this going to cost in time, people and money, and is this included in the budget?
4. How is the evidence going to be gathered?
5. When will the partners review the project? (this won't happen until later, but should be timetabled)

This should give you an evaluation strategy to work with your project outline plan.

Appendix 2: Suggested report headings/outline

This outline is based both on Partnerships for Learning, and evaluation reports produced by Richard and Sarah in collaboration with other clients.

The important thing to remember about reporting is that the final evaluation report, whatever form it takes, should be meaningful and useful. First and foremost, it should be of strategic and tactical use to the team and organisation leading; in the case of partners, each one has to be able to identify the lessons it has learned within the overall framework.

Three points to remember in general:

- Has the report told the story of the project?

- Has the evidence been interpreted?

- Have the judgements been made on the basis of the evidence and then conclusions drawn?

Context

It is useful to set the scene for the readers of the report at the start, but background information need not be exhaustive here – further information or details can always form appendices.

- Background to the organisation, including experience of audience development and evaluation

- Background to the project, including information about the people or groups taking part or attending, or working with the organisation; key partners (why and how their involvement took shape)

- When the project happened and a timetable in narrative form

- Funding acknowledgements and other credits

Description of project

This is likely to be a fairly substantial part of the report and can include:

- A summary of the project and what took place

- Documentation related to what happened, eg audience figures, groups contacted, description of events or activities that took place (again, this can be summarised with more detail attached as an appendix)

- Budget

Aims, objectives and measures of success

This part should outline what the organisation set out to achieve and the methodology used (training, programming, events, activities, etc), as well as indicating how the organisation decided to measure the success of the project, that is, the targets or goals set.

It will be most useful to include:

- Aims and objectives: as agreed at the planning stage, with an explanation of any changes made during the progress of the project, and the basis for those changes

- The measures of success agreed by the organisation and any partners, which might be audience figures, or network-building, or numbers of events, etc. This can also include social or learning outcomes. For example, if one measure of success was to create a network of disabled groups that attend regularly, the organisation could measure numbers and frequency of attendance over the project's progress. Another measure might be increased confidence amongst volunteers in understanding issues of disability awareness and therefore improved customer service, measured by feedback from volunteers and disabled attenders.

- Explanation of how the project was evaluated – how the organisation decided to go about it; the tools used (questionnaires, video, audio/written diaries, feedback sessions, etc); the use of external evaluators or how the balance between in-house and external input was achieved

Findings/results

This is a crucial part of any report, and deserves full attention when writing it. This should be a dispassionate account of the following, as the analysis and interpretation is included in the Conclusions:

- What the evidence/documentation shows as a result of undertaking the project
- An assessment of whether the aims/objectives were achieved
- A summary of the success (or otherwise) of the project
- Any unexpected outcomes, and the impact on the project

Overview

A SWOT analysis can be useful in this part of the report, although for the sake of readability, it should probably be translated into a narrative summary. However, not all organisations will find it useful to include an overview, depending on how the conclusions are drawn out.

Conclusions

Again, this section is crucial to the organisation and any readers, as this should inform both the organisation's future activities and strategy, but may also inform funding policy (especially in the case of New Audiences). Essentially, this is the analysis or the interpretation of the evidence collected to show what happened as a result of undertaking the project.

This should include:

- Lessons learned for the organisation and partners, and how these will inform or change future projects or strategies
- How the project will be used in the future by the organisation and partners and what would be done differently

Appendices

These can be very useful for attaching more detailed information, without making the main body of the report too long or cumbersome, and can include examples of:

- Documentation like press coverage, leaflets, etc
- Evaluation tools used, such as blank questionnaires, etc
- Detailed evidence collected and the interpretation like survey responses, etc
- More information about the organisation, partners or the artist/project team
- Project briefs supplied to partners, participants, artists, facilitators, etc

Appendix 3: Review and reflection

Aspirational Arts Partnerships (Sarah Bedell and Richard Whitehouse) have been asked to gather views from key individuals working with Sue Williams and Shahid Bashir, using the same questions, so that we can gather information consistently. Please answer them from the perspective you have of the project and whether you have been involved with one or both of them.

We are happy to work through these questions in whatever way suits you – it is most important to us that we have a representative range of responses. If you would like to talk through the notes, please contact Sarah (01702 306831 Tues-Thurs) or Richard (020 8694 0085 all week) to arrange a phone interview. If you have documentation that answers any questions, please feel free to send it to us with the relevant bits noted. Obviously, it is most convenient to receive notes on this form electronically, but you can also fax them through to 01702 306849 or post them to: Sarah Bedell, 44 Ditton Court Road, Westcliff on Sea, Essex SS0 7HF

Reviewing

With regard to the role of the co-ordinator(s), what do you feel they have achieved so far:

* Overall

* Against the original aims and objectives

* For your organisation or role as part of Creative People

What would you say were the main strengths of their contribution?

And the main weaknesses or challenges?

What could be improved in terms of

* Infrastructure – relating to support and resources available, timing and timetabling

* Organisational – integrating professional development of the culturally diverse and disabled within your own, your organisation's or the sector's practise.

* The existing and/or proposed structure and contents of the programmes, events or other work each of them has developed

* Their working with partners (new and existing)

* Levels of participation they have achieved, including partners, within organisations etc

NETWORK DATA MODELLING PROJECT: CREATING A DATA CULTURE

We need to know how the work of Sue and Shahid has been productive and useful to organisations, as part of the overall evaluation and reporting. Please can you tell us:

* what you found most useful about any sessions, guidelines, conversations and other contact you have had with either of them so far?

* what was least useful?

* What aspects could be improved?

Reflecting and moving forward

The purpose of this is to reflect on the contribution of Sue and Shahid to the project so far and to make sure that what was learned is collected together and used, not just by participating organisations, but by the entire industry, through dissemination (the final report will be one method).

There are two key questions to focus on:

* What have we learned from their contribution to the project in their first year?

* How could things be done differently in their second year?

Please answer these questions with the following headings in mind:

* Infrastructure – relating to, support and resources available, timing and timetabling

* Organisational – integrating professional development within your own, your organisation's or the sector's practise.

* The structure and contents of the programme, events or other work related to the project

* Delivery of work (including sessions, etc) and timing

* Working with partners (new and existing)

* Levels of participation, including partners, within organisations etc