Manchester Metrics Pilot

Final Report of Stage One

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Manchester Metrics Pilot: Final Report of Stage One

Introduction

The Manchester Metrics Pilot, supported by Arts Council England, is a project that is exploring the practicalities and possibilities of a sector-led metrics framework to capture the quality and reach of arts and cultural productions.

A group of cultural organisations in the North West of England, the Manchester Metrics Group (see Appendix 1 for a list of the participating individuals and cultural organisations), were invited to take part in the pilot, and this report details the outcomes of their work.

The project takes its inspiration from a project initiated in 2010 by the Department of Culture and the Arts (DCA) in Western Australia, which commissioned consultants Intelligence Agency and Pracsys to work with arts organisations to develop a metrics system that uses a combination of self, peer and public assessments to capture the quality of arts and cultural work.

The Manchester Metrics Pilot began in April 2012, and is ongoing. That has in part complicated the completion of this summary report on Stage One as, in practice, Stage One (the proof of concept and metric formulation phase) has bled quickly into Stage Two (the testing phase) and a NESTA Big Data Application process.

Stage One of the pilot contained the following elements and activities:

- To work with the Manchester Metrics Group to determine what key outcomes best capture the quality and reach of cultural experience and cultural production.
- To define a clear 'outcome' set for these key dimensions of quality and reach, and then to begin to develop, but not agree, metric statements that captured the essence of these outcomes.
- To talk with Arts Council England (ACE) assessors about what they thought the key quality outcomes might be, and to assess the implications for the forward development of ACE's artistic assessment processes.
- To share these findings with Arts Council England so as to determine whether further development of the outcomes and metric statements was viewed as a worthwhile continuation of Stage One of the pilot.

Reporting the findings

The Manchester Metrics Group co-produced and signed off their account of the Stage One process in a report that was completed in early July 2013, and which had already been shared with Arts Council England. That report is the formal output of the Stage One process, which carries the endorsement of the Manchester Metrics Group. We present that report as Chapter 2 in this report, as it summarises the key outputs from the project, and contains recommendations drafted by the Manchester Metrics Group.

The Manchester Metrics Group also co-produced and signed off a communications briefing in October 2013 to explain the outcomes of Stage One, and describe the Stage Two testing work, which is still underway (see Appendix 2). This briefing was to help the consortium members and ACE respond to growing requests for information from the wider cultural sector on the focus and progress of the Manchester Metrics Pilot.

This report has been drafted to:

1. Describe the overall approach and working processes undertaken by the Manchester Metrics Group.
2. Provide a more detailed account of the metrics formation process, teasing out some of the key challenges and issues around the outcome set and metrics formation. Of particularly interest here are the challenges around developing a core set of metrics that can work effectively for all cultural and heritage organisations.
3. Review the implications of the sessions with ACE artistic assessors and to review the implications for quality assessment.
4. Draw some conclusions about the opportunities and challenges of this approach to metrics formation across the cultural sector.

Chapter 1: Manchester Metrics Pilot – overall approach

Introduction

John Knell, the facilitator of the metrics formation process, and the Manchester Metrics Group agreed that the group should start with a blank sheet of paper. In other words, the group would not review either existing ACE metrics, or the emerging metrics set produced by the DCA work. Rather, the group set themselves the challenge of working from first principles, addressing the following questions:

- What do we mean by quality?
- What do we mean by reach?
- What outcome areas should we be measuring to capture quality and reach?
- What are the metrics statements that best capture the essence of those outcomes?
- Is it possible to develop a dashboard of measures capturing quality and reach that we would be happy to collectively endorse and use?

1.1 Working process

The metrics formation process took the form of whole group meetings of the consortium members (in all there were five substantive sessions).

For the inception meeting, John Knell produced an introductory presentation outlining the aims of the project and agreeing the ground rules for how the group was going to work together. The key content elements of that presentation were to firmly establish the following:

1. The distinction between outputs and outcomes

- Outputs are important products, services, profits and revenues: **the What**.
- Outcomes create meanings, relationships and differences: **the Why.**
- So a performance or exhibition is an **output**.
- The **outcomes** of that performance or exhibition reveal the extent and kinds of impact the project has on its participants. Impact could be reported in the amount of change in behaviour or the attitude of audience members or participants.

2. The outcome territories for quality (product, process, experience) *and reach* (audience number/diversity, platforms for collaboration/sharing, real and virtual dimensions)

From this starting point, the group spent their time together brainstorming, agreeing, and refining the key outcome areas and, where relevant ,the indicative metrics statements.

1.2 Note-taking and capturing progress

Understandably the first two meetings (30 April and 14 May 2013) were the most wide-ranging working sessions during the pilot in terms of the content of the discussions. Key questions and issues were raised about the outcome set and the group's approach to developing the metrics, in terms of their applicability across different artforms, and the design principles underpinning their formation. Those deliberations are extremely valuable in understanding the character of the final outcome and metrics set (see Chapter 2), and John Knell's full notes from both of those sessions are available in Appendix 4 and 5.

After each meeting, John Knell circulated to the group a PowerPoint presentation of the emerging outcome set and metrics – effectively a 'live working draft' of the group's metrics formation work. The presentation would then form the starting point for discussions at the next meeting. The five meetings took place every two weeks, which allowed ample time for reflection between meetings, and for John Knell to respond to requests for changes and modifications.

The core elements of the outcome set were in place after the first three meetings, with the remaining two meetings concerned with developing the metrics statements capturing the core essence of the outcomes and with how the group wanted to convey its recommendations and thoughts back to Arts Council England.

The Manchester Metrics Group's endorsed report (Appendix 2) is effectively the final approved version of the 'live working draft' presentation.

1.3 Arts Council artistic assessors

Alongside this process, but separate to it, John Knell ran face-to-face meetings with some ACE artistic assessors, in order to explore the following issues:

- What they thought were the important measures of quality.
- What is in their mind – in terms of outcomes or measures – when they are conducting an artistic assessment of a piece of work.
- Their reflections on how artistic assessment can best develop in the future.

The outcomes of those sessions and their implications for ACE are outlined in Chapter 3.

1.4 Feedback and discussions with Arts Council England

Throughout the process, John Knell held meetings with key ACE staff to brief them on the emerging outcome set and on the approach being adopted by the Manchester Metrics Group.

John also ran a session for a group of ACE officers in the ACE North West office, briefing them on the scope and ambitions of the pilot, and on the findings from the DCA-sponsored work in Western Australia.

The final Manchester Metrics Group report (Chapter 2) was tabled and discussed at a meeting on 9 July 2013, with the full Manchester Metrics group, ACE represented by Simon Mellor, Andrew Molah and Vivien Niblett, John Knell, Michael Chappell from Pracsys and Colin Walker from the Department of Culture and the Arts, Western Australia.

Chapter 2: Core outcome and metrics set

Introduction

This account of the core outcome and metrics set was co-produced and signed off by the participating cultural organisations within the Manchester Metrics Group (see Appendix 1). It captures their collective views.

Manchester Metrics Group – Report of outputs and recommendations

2.1 Introduction

This report summarises the outputs of the Manchester Metrics Pilot sessions held in Manchester between April and July 2013.

In those sessions the group sought to:

- Identify the key outcomes that capture the creative success of cultural organisations.
- Identify outcomes for quality of product, quality of experience, quality of creative process and quality of cultural leadership.
- Identify both output and outcome measures for key aspects of reach and resilience.

In addition to reporting these outcome measures, this report also makes a range of observations about how these measures might best be used, the implications for public reporting of success alongside self and peer evaluation, and specific recommendations to ACE on implementation questions and next stage development of the work.

We would like this draft report and the suggested outcomes to be regarded as ‘work in progress’ at this stage, and we are keen to develop the outcomes and measures in the months ahead. For example, under each of the outcomes we have developed, the next stage would be to develop standardised definitions for each, and refine the related response categories for peers, self and public (including children and young people) against each suggested metric.

2.1.1 The emerging outcome set

In presenting the outcomes, we have grouped them under two categories:

- Quality – the quality of the product and creative process, and the quality of experience and depth of engagement.
- The organisational health of funded organisations.

Under each category, we make clear which metrics are likely to take the form of ‘public’ outcomes – which will tell the value story of the arts to investors and the public. In contrast, some metrics are more appropriate as self-evaluation

and improvement metrics, which either a funder or funding recipient can use to plan, self-evaluate and improve their activities.

2.2 Quality – the quality of the product and creative process – and the quality of experience and depth of engagement

2.2.1 Excellence

We discussed 'excellence' as an outcome category – and would define as follows:

Outcome	Want peers to say:	Want public to say:
EXCELLENCE	'Best of type anywhere'	

Excellence is only meaningful as a standalone outcome category if defined as an absolute quality standard (as per the metric statement above) and judged through a peer review (artistic assessment) process. Peers in this case would be expert practitioners or reviewers with sufficient expertise and experience to make national or international comparative judgments on a piece of work.

If ACE proposes to use 'excellence' as an explicit outcome category, this places great emphasis on the quality of its artistic assessment processes. We do not believe that the artistic assessment process as currently constituted could provide an outcome assessment for 'excellence' that would be rigorous and robust enough.

We propose that there is a 'dashboard' of measures for quality – which is made up of all the outcome measures we list below. Excellent work would be defined by the performance of a particular performance or programme of work across our suggested dashboard of outcome measures.

2.2.2 Quality of product

We have identified four key 'outcome measures' to capture the quality of a piece of work (performance, exhibition, installation) – originality, risk, relevance and finish (see Table 1 below)

It is worth nothing that the 'risk' outcome is something that we would expect to be assessed by peers, rather than by the public.

Taken together, the assessment of a performance or exhibition against these outcome criteria would offer a rigorous benchmark of the overall quality of that work. If it scored highly on all these criteria – judged by self, public and peer – then it could rightfully be called an excellent piece of work.

Table 1: Quality of product

Outcome	Want peers to say:	Want public to say:
ORIGINALITY	'Felt fresh' 'Unique ambition' 'Broke new ground'	'Felt new and different from things I've seen before' 'It was full of surprises'
RELEVANCE	'It was a contemporary interpretation'	'Had something to say' 'Relevant to me / my experience'
RISK	'Fearless' 'Challenging' 'Opinion forming'	
FINISH	'Well made / performed' (in relation to budget)	'It looked great' 'It sounded great' 'Great atmosphere'

These types of outcomes would offer a 'public' account of the quality of cultural production, offering the opportunity for funder and funder recipient to benchmark this dashboard of quality measures over time.

2.2.3 Quality of experience / depth of engagement

We have identified four 'key' outcome measures to capture the quality of cultural experience – focusing on the impact of that experience on feelings, attitudes, behaviours and understanding (see Table 2 below).

Table 2: Quality of experience

Outcome	Want public/ peers to say:	Want public to do:
FEELINGS	'I really enjoyed it' 'It unsettled me' 'I was excited… inspired' 'That was thought provoking' That was life enhancing' 'It enraged me' 'That went right over my head' 'That was a great use of my time' *Prompt question*: 'Did you pay for this experience?' *Answers:* 'Do you think it was money well spent?' 'If it was free, was it worth supporting with public money?'	
ATTITUDES	'Made me curious' 'Made me think about' 'Made me more interested in…'	
BEHAVIOURS	'I intend to come again' 'I want to find out more' 'I talked about it with…'	'Share, Tweet, comment, video, recommend' 'Get involved' 'Buy/download a related product (book, play, DVD/CD)' 'Volunteer' 'Donate' 'Bring someone back to see it'
UNDER-STANDING	'I feel differently about…' 'I understand…' 'It changed my views' 'I learnt something new' 'Made me more aware of…' 'Made me want to learn more about…'	

Our work together identified a number of key assumptions and design principles in how best to explore and capture the quality of cultural experience.

Firstly, it's important to use plain English and approachable response categories that would be equally legible for regular attenders and first-time attenders of a cultural event.

Secondly, ensure that we don't fall into the common trap of arts evaluation work, and indeed arts policy narrative, which is implying that for a cultural experience to be a 'good' experience, it has to be an inspiring or transforming experience. Of course, many cultural experiences do indeed have that impact on audience members or participants, but there is a whole spectrum of response short of 'transformation' that can confirm that the experience was a 'good' one. Therefore an appropriate spectrum of response categories is vital to the effective evaluation of any cultural experience.

Thirdly, it is important to have response categories that invite consideration of a negative response – rather than a default 'happy sheet' response – in which a set of positive statements are the only response categories offered (with the chance to agree or disagree). This relates directly to the issue of how we assess the quality of an experience. If, as a result of a cultural experience, an individual feels unsettled or enraged by a particular performance, this does not mean that the individual concerned has had a 'bad' experience – rather the opposite – they have clearly been engaged and moved by the cultural event.

Clearly therefore, these types of reactions should be sought in response categories. More broadly, the group noted that if a cultural experience has had a powerful impact on audience members or participants, then in those circumstances one might expect that the greater majority of respondents respond either very positively or negatively to the experience. So for example, one might expect that a piece rated by peers as original, challenging and opinion forming (in our quality of work outcome categories) would potentially polarise audiences, with the majority of their responses to outcome categories being to strongly agree or disagree (if responding to a sliding three-point scale ranging from strongly disagree, to agree, to strongly agree). If the majority of respondents were enraged or unsettled, this would be a sign of an immersive, 'good' cultural experience – measured in terms of impact and engagement – not a bad cultural experience. Indeed the group suggested that when the majority of respondents cluster in the middle of these response scales ('the mediocre' middle), this could be taken as a sign that the work has not been impactful in a quality of product and experience sense.

The power of a metrics system build around these types of outcomes is that it is the *combination* of the peer, self and public assessments that provide a much richer understanding and interpretation of quality and impact.

These outcomes measures for quality of experience would not only be asked of audience members, but would also be asked of specific communities of interest and practice.[1] So, for example, a community of interest might be a group interested in particular cultural products or topic areas, while

[1] A community of interest is defined as a '*group of people who share a common interest or passion'*. A community of practice is defined as a '*group of people who share a craft and/or profession*'.

communities of practice would include, for example, volunteers, teachers, co-producers and collectors.

As with the quality of product outcomes, these quality of experience measures would offer a powerful 'public' account of the value being created by arts and cultural activity.

2.2.4 Quality and depth of engagement

An important subset of quality of experience is the depth of engagement (we are taking it as a given that we would be fully capturing the normal range of 'output' measures for 'reach' – how many, who, where – for audiences, and specific communities of interest and practice).

The group suggests there also need to be some additional outcomes that can capture depth of engagement in this quality of experience category. The aim being to develop an outcome measure which captures the *quality of the connection* with specific groups, in terms of demonstrable engagement or collaboration.

We therefore developed some clear depth of engagement outcomes for audiences (communities of interest) and communities of practice. So for audiences, Table 3 below outlines the key outcome measure here – quality of connection.

Table 3: Quality of connection – communities of interest

Outcome	Want audience (communities of interest) to say:
Quality of connection	'They have recognised our interests and passions

Table 4 below outlines the same outcome dimensions for communities of practice.

Table 4: Quality of connection – communities of practice

Outcome	Want communities of practice (collaborators/participants) to say:
Quality of	'We feel valued as a group'

connection	'We feel listened to as a group' 'We have been able to make a real contribution to their work'

Clearly, in an evaluation encounter, there would be a number of question prompts that would seek to illicit responses to the 'quality of connection' outcome category. So for example, the questions might run as follows:

- 'Do you have a particular interest in the activities of the organisation (answer – yes/no)?
- Is yes, how easy was it to purse those interests more deeply with…?
- Did you feel valued as a group?
- Has it made you attend / participate more / get more involved etc?

2.2.5 Quality of creative process

A vital element of artistic and creative excellence is the quality of the creative process, as judged by peers (peer review community, artists and collaborators).

We have developed four outcome measures capturing the quality of creative process – distinctiveness of practice, technical proficiency, collaborator experience, and quality and diversity of artists/workforces.

Table 5 below outlines the key outcome measures for quality of creative process.

These outcome measures are already measures of quality on which we seek feedback from our collaborators and peers. However, it would be useful to share experiences and formalise an approach to measuring these outcomes.

These outcomes could form a valuable element of a refreshed self-evaluation framework for arts organisations, and could act as a useful prompt for dialogue between funders and funding recipients over their core creative processes, exploring their relationship to our proposed dashboard of quality measures for product and experience. The majority of them, therefore, would not be 'public measures', although some of the more output-based measures around skills and workforce diversity could form part of the sector's wider public reporting on its activities.

Table 5: Quality of creative process

Outcome	Want peers to say:
Distinctiveness of practice	'Clear artistic authorship' 'Artistic integrity'

	‘Influencing the practice of others’ ‘Willingness to experiment and take risks’
Technical proficiency	‘High quality of performers’ ‘High quality of production and technical staff’ ‘High quality of facilities’ ‘High quality of producers and curators’
Collaborator experience	‘I enhanced my reputation’ ‘I was well treated’ ‘I was challenged and stretched’ ‘I felt safe’ ‘I felt a sense of artistic chemistry’ ‘I had freedom of expression’ ‘There were high levels of mutual trust’ ‘Great and clear communication’ ‘Inspired by the expertise of the people I worked with’ ‘A great learning environment’ ‘Great audience’
Quality and diversity of artists / workforces working with / for us	‘High-quality artists/technicians, production staff want to work for them’ *Other (output) measures:* Skills / CPD measures

2.3 Organisational health

We have developed three key output/outcome areas to capture the organisational health of cultural organisations:

- Financial metrics.
- Quality of cultural leadership.
- Quality of relationships and connections.

We didn’t start the sessions with the idea of developing a reporting theme around ‘organisational health’, but having produced outcomes for quality of cultural leadership, and networks and connections, it became clear to the group that these outcomes, when placed alongside financial metrics, together constitute a powerful dashboard for organisational health.

The group also felt that there would be welcome clarity in separating out assessments about the quality of creative work from assessments about organisational health and resilience.

2.3.1 Financial metrics

The quantitative, output-based element of organisational health are the financial metrics. We identified the following key metrics:

- Earned income (box; fees; conferencing/hire fees; merchandise; food and drink; sponsorship; donations etc).
- Market value of in-kind contributors.
- Profit.
- Endowments.
- Other public sector or third sector funding (trusts and foundations).

The group discussed at length the issue of data reporting on financial metrics (for example how ACE collects and uses any financial data provided), the interpretation of that data and the desirability or otherwise of financial 'targets'.

With regard to financial reporting, currently all National portfolio organisations and Major partner museums submit full business plans to ACE. No doubt relationships managers consider this financial data, but the group felt this process had highlighted the value of some further discussion between ACE and funded organisations over a range of financial reporting issues including:

- The financial data we would expect relationships managers to extract from our business plans in developing any narrative account on our organisational health or resilience (including, for example, liquidity and other ratios).
- The danger of any dirigiste and over-prescriptive financial targets. For example, a wide diversity of income streams may be a more vibrant indicator of organisational health then income growth per se if based on a narrow number of sources.
- The need for ACE to ensure that a light touch financial reporting regime maximises the value story for individual organisations and the sector as a whole. For example, the group would support the development of a light touch GVA model by ACE, and it would be better still if that model could be developed in partnership with other co-investors, such as local authorities, and trust and foundations.

This type of approach would ensure that any financial metrics reported on result in the stronger possible 'public-facing' value story to Government, and the public.

2.3.2 Quality of cultural leadership

We have identified four 'key' outcome measures to capture the quality of cultural leadership – clarity of mission/objectives, independence, integrity and local impact – summarised in Table 6 below.

We believe that assessing the quality of cultural leadership is a vital issue for the ongoing development of individual cultural organisations, and for funders and investors. The best cultural organisations are extraordinarily adept at balancing creative and commercial drivers, and have a very sophisticated understanding of their business models and future challenges.

We are clear that publicly funded organisations have a responsibility to the places and communities that they serve, which we take seriously in framing our strategies and activities. A dialogue around 'local impact' is an important element of our value story and contribution – and should form part of any assessment of our impact.

More broadly, the great benefit of assessing the quality of cultural leadership, as part of an 'organisational health' dashboard, is that it will clearly identify:

- Those organisations that have high levels of leadership and governance competence.
- Explicit areas, for example in terms of leadership and planning capacity, in which parts of the sector might need additional support.

We believe a desirable outcome would be for ACE and other funders to move to a more rigorous but also more flexible assessment regime, where, for example, if an organisation has been rated as exemplary in terms of its organisational health (and wider performance in terms of quality of product and experience) then it will be subject to a less onerous reporting regime for a funding cycle than an organisation which is struggling across the same rigorous dashboard of measures.

Table 6: Quality of cultural leadership

Outcome	Want peers to say:
	'A clear mission informs what they do'

Clarity of objectives/ alignment with mission	'Brilliantly led' 'Clear about what they're trying to achieve' 'Clear about what they value' 'A clear sense of cultural ambition' *Staff would display*… 'High levels of tangible, aligned commitment' 'Awareness of organisation's strategic direction (ie clear line of sight)'
Independence	'True to themselves' 'Clear sense of autonomy' 'We trust the quality of their artistic adjustment'
Integrity	'They stay true to clear principles'
Local impact	'They make a difference to the city / to the communities they work with' 'They take their local leadership role seriously' *Public would say:* 'Proud it's happening here'

2.3.3 Quality of relationships and partnerships

The breadth and quality of an organisation's relationships and partnerships represent an important indicator of reach and resilience. We therefore recommend an additional outcome of 'value-adding partnerships' as a signifier of organisational health.

Outcome	Want organisations and partners to demonstrate/say
	Organisations would demonstrate how:

Value-adding partnerships	'Partnerships with other sectors/ organisations have supported our aims' 'Partnerships have allowed us to access skills, knowledge and capacity' *Partners would say*: 'This partnership has added value to our activities'

2.4 Recommendations

The group would like to make a number of closing recommendations, over and above those already made in relation to the use and implementation of the suggested outcomes.

Our key recommendations are as follows:

We think that further development of the outcome map will be of great value to us as cultural institutions, the wider sector, and ACE.

We would like the opportunity to develop the work – ideally by applying for further grant monies – piloting it here in Manchester and taking it on to its next level. We believe that this approach to co-producing outcomes will have a greater impact on the sector if a useable practical model is being actively developed. Our intention would be to work closely with ACE and others to refine the outcomes, exploring in more detail the layers of engagement when comparing museums to the performing arts, and engaging with other partners to test the outcome map.

We would suggest that after this next stage, the emerging outcome set could be taken to other regions – including key arts organisations in London – for further development and refinement.

We intend to stay together as a 'learning group' and would like to work closely with ACE as you develop your thinking in response to this work. For example, as ACE continues to refine its understanding of outcome measures over the coming months, and the implications for the articulation of its policy frameworks, we would like to be used as a 'sounding board' for that work and we are keen to contribute as best we can.

For ACE, there are a number of development options that flow from this work.

The outcome map has implications for:

- ACE's own success measures and the outcomes that funded organisations and programmes could report against.

- ACE's artistic assessment processes and the role of peer review communities (including the leaders of National portfolio organisations and Major partner museums).
- ACE's self-evaluation processes – clearly some of the suggested outcomes (quality of creative processes; organisational health outcomes) are directly relevant to self-evaluation and planning purposes.

We would like to emphasise that throughout this process, our working assumption has been that any new outcome set must aim to lessen the reporting burden on National portfolio organisations and Major partner museums required by ACE and other funders.

We believe that our work has confirmed that is should be possible to simultaneously reduce the number of metrics we report against, while allowing us, ACE and the wider cultural sector to tell a richer story about the value we create.

Manchester Metrics Group
8 July 2013

Chapter 3: Artistic assessment – thoughts and recommendations

Introduction

John Knell met with three experienced Arts Council England assessors (two pulled out of the meetings at the last meeting, with the original intention to run two meetings with three artistic assessors at each meeting) to discuss the project. The aim of the meetings was to share with them the approach being adopted in the Manchester Metrics Pilot, and to prompt the assessors to explore similar questions to those being addressed by the Manchester Metrics Group, in terms of their views on what are the key outcomes that define a high-quality piece of work.

This involved exploring both reflections on what is in their mind when they are using ACE's current artistic assessment form, and what outcomes and measurement criteria are most important in forming their assessments. The meetings took place over two different two-hour sessions – with Ian Tabbron of the Manchester office present for part of one of the meetings.

Inevitably the focus of the discussions led to direct commentary on the current artistic assessment template, as well as wider observations on the challenges of assessing the quality of cultural activity.

None of the assessors have been formally identified in the analysis below, as confidentiality was an agreed condition of their participation.

3.1 Key points and reflections

General observations on the art of measurement and assessment
The assessors raised the potential fear that any overarching measurement framework carries with it the inherent dangers of a 'one size fits all approach'. They were very curious as to whether the Manchester Metrics Group would be able to square this circle, in terms of coming up with a core set of metrics that worked well for the diversity of artforms represented in the group.

Assessing the quality of a piece of work/production
I asked them to step away from the template and think about what's in their mind when they are assessing the quality of a piece of work. The broad consensus was that when assessing the quality of a piece of work, there is what they dubbed a 'hard' and a 'soft' element.

The 'hard' element refers to the technical proficiency of the production itself – the quality of the animating idea – 'the depth in terms of dealing with the subject'.

The 'soft' element refers to the impact on me, the audience member or viewer, and the 'originality', 'level of innovation' or 'freshness' of the work in question.

They all noted that making any of these judgments requires detailed expertise of the artform – which provides the context for any individual assessment. For example, one of the assessors was an expert in classical music, and noted that, in making these judgments about 'level of innovation' or 'freshness', a number of specific artform contexts has to be taken into account, for example:

- 'stylistic conventions around interpretation and performance', and
- 'performing conventions'.

This knowledge allows the assessor to reference or validate their judgments against other relevant benchmark performances and to ensure they inoculate as much as possible their assessments from personal preferences.

They noted that this necessary interpretative context poses a significant challenge for the skills base of the assessor community used by ACE.

One of the very experienced assessors noted that the artistic assessment form question on the 'impact of the work' – in particular 'does the work make a contribution to the development of the artform?' – is very difficult to answer without significant artistic assessment experience, noting that most of the time the work seen doesn't pass this high assessment hurdle.

The assessors acknowledge that words like 'quality' and 'excellence' can be problematic. As one assessor commented that neither 'quality' nor 'excellence' is directly measured or assessed as such. They agreed that in practice the 'quality' of any piece of work is made up of a dashboard of outcome and questions – some of which the current template covers, some it does not.

The assessors noted that the current assessment template doesn't really isolate and give enough emphasis on valuing risk-taking or innovation as a key outcome. Some of the prompts in question 1 (the vision and execution of the work) touch on this – but not directly enough. They also noted the importance of context in assessing risk. One assessor noted that 'risk-taking has to be assessed in relation to the organisation'.

We discussed some of the key phrases and essences of assessing risk and innovation. Assessors talked about the following:

- 'breath-taking',
- 'pushing boundaries',
- 'challenging', and
- 'breaking new ground'.

All of which are congruent with the metric that the Manchester Metrics Group have developed for originality.

Other key measurement criteria

Interestingly, in practice, all three assessors have 'developed their own way' of using the template. They identified a range of factors that they consider in their assessments, which include the following:

- Budget – an 'in relation to budget' consideration clearly influences the interpretative context for any assessment judgments.
- Technical quality.
- Ambition – were they brave? Did they show an adequate level of ambition? Were they trying to push their audience?
- Relevance to audience.
- Venue suitability.
- Interpretation – there was an acknowledgement that interpretation is important, but that words like 'contemporary' interpretation are difficult concepts. It begs the response 'contemporary for whom?'
- Rigour – assessors talked about the rigour of the artistic and curatorial process. One of the assessors talked about considering 'how much space you give to the artistic practice' – so, for example, asking the question 'have they worked hard in rehearsal to produce this piece?' Other measurement prompts here included 'how might/could it have been improved?' One of the assessors emphasised the importance of asking the 'it's great, but?' question.

All of this led into a debate about the importance of assessing the 'clarity of artistic leadership or intention', or what one assessor dubbed 'distinctive creative leadership'. The assessors thought this was a good category that should be part of the assessment criteria.

One of the assessors described how they try to access this issue through the questions they ask themselves. So for example, one of the assessors with a music specialism often comments on the complementarity of the programme as a whole – 'does it add up to a satisfying, distinctive whole?' Another assessor commented that central to approaching assessment is to ask 'Where are they going with this work?' and 'Does it set a model for the future?' This helps the assessor to create a dynamic internal conversation as they assess the critical qualities of the work.

3.2 Comments on the current artistic assessment form

Our discussions inevitably strayed into a discussion about the strengths and weaknesses of the current ACE Artistic Assessment Form.

The best element of the template is that it:

- has intelligent prompts to guide the assessor, and
- is underpinned by a principle to evidence everything you say.

The weaker element of the assessment process is that it should maintain a clearer distinction between commenting as an expert – an expert view – and

commenting on the reactions of the public, which the assessors felt should be kept separate from their assessments. For example, the current assessment form asks assessors the following question under the audience segment of the form: 'If you experienced the work in the presence of other people, how did they react?' The assessors felt that the problem with these types of question is that it encourages assessors to collapse the boundaries between offering an expert view and being an audience member. As one assessor commented: 'There has to be clarity that you are bringing your expertise to the assessment.' Another commented: 'This is the most difficult part of the current form, I often have nothing to say on this – it should probably go as it's asking me to be a five-minute anthropologist, and I'm not trained for that activity.'

It was noted that judging audience reaction is also particularly difficult in gallery and museum settings.

Other areas in which the template could be improved, according to the assessors interviewed, included:

- Clearer guidance on the outcomes we should be looking for – it needs to be more specific in terms of the basis of our assessments – while leaving space for some general commentary.
- Having a set of definitions would be helpful for assessment purposes.
- Inviting an assessment of whether the cultural organisation has met their stated ambitions for a piece of work.
- Cut out repetition across template dimensions.

3.3 Conclusions

An important piece of feedback to ACE from these sessions is how much the assessors would welcome the opportunity to talk with cultural organisations and artform experts about these issues relating to the assessment of the quality of cultural work and cultural experience. They felt the current level of exchange with ACE (the annual meeting of artform assessors) on the process of assessment was not in depth enough to properly share views and thoughts on how to improve the assessment process.

These interviews, from admittedly a very small sample, also suggest that some minor and quick improvements could be made to the current artistic assessment form. In particular, it might be worth considering a rethink of the audience segment dimension (question 6) and a sharpening-up of the scope, focus and clarity of key terms that are currently used in the template as assessment prompts. So, for example, the assessors were supporting a greater emphasis on terms like rigour, risk, and innovation or originality. Interestingly, all of these outcomes have featured prominently in the deliberations of the Manchester Metrics Group.

For the Manchester Metrics Pilot more broadly, a number of important implications came out of the artistic assessor sessions. All of the assessors

stressed the importance of the interpretative context in making an expert assessment.

Looking forward, this would suggest that even if there is merit in the emerging core metric set coming out of the Manchester pilot, for use by self, peer (artistic assessor) and public, there will still be great value in a complementary interpretative process in which assessors would share the interpretative context that is shaping their scores across a portfolio of assessments (possibly in the form of open dialogue boxes alongside recording their scores for the different metric statements). That dialogue is also likely to reveal which of the dimensions are working well for a particular artform, and the need for any additional artform-specific outcomes or metrics that could usefully sit alongside the core metric set applicable to all artforms.

This suggests that in the testing phase of the metrics, it would be good to include ACE assessors within the peer group, and that if they were involved in the next stage testing it would be useful for ACE to bring them together after the testing process to facilitate their reflections on both the metrics, and the process of assessing work using standardised metric statements.

Chapter 4: Process reflections and recommendations

4.1 Overall commentary on the metric formation process

The key challenge for the Manchester Metrics Group was whether they would be able to generate a high degree of consensus about the key outcomes areas for quality and reach. It was striking that the group were able to relatively quickly agree these key outcomes areas.

The group also quickly agreed some key design principles for the project, most importantly the need to use simple, approachable language that could both engage them as creative practitioners and encourage their audiences to respond.

The other key feature of this pilot project was that the Manchester Metrics Group came up with some additional outcomes areas for quality as compared to those created in Western Australia, which were:

- Quality of creative process.
- Quality of cultural leadership.

Let's discuss each of these metrics areas in detail and draw out the key implications for the future development of this approach.

4.1.1 Quality of creative process

The group felt strongly that artist, curator and collaborator outcomes were equally important components of quality as were audience outcomes. The group identified a number of groups whose experience is important when measuring the quality of the creative process:

- Artistic/curator experience (with a clear talent development dimension to be captured here).
- Collaborator experience.
- Co-producer experience.
- Artisan/theatre maker experience.
- Collector experience.

The group set themselves the challenge of asking 'what would these groups be saying after a high-quality creative process?' How would they express a sense of 'artistic ownership' in the work they were involved in producing? Given the focus of these outcomes, the group agreed that they would be peer assessed by the artists, curators and producers involved in producing the particular piece of work.

The key creative process outcomes generated by the Manchester Metrics Group (distinctiveness of practice; technical proficiency; collaborator experiences; quality and diversity of artists/workforces) are powerful additional measures of the quality of cultural activity.

Taken together with the other key metrics, they form a powerful dashboard for quality of product, process and experience. It will be interesting to see when the metrics are refined and tested whether they start to generate useful and insightful data that could start to meet the Manchester Metrics Group's desire to help create a refreshed self-evaluation framework for their activities.

With regard to these quality of creative process metrics, the group discussed how these 'peer' measures of the creative process would not be appropriate for capturing more participatory pieces of work, involving members of the public and/or amateur artists and creative contributors as co-producers.

Therefore a possible further addition to the emerging metric framework would be to use the co-production approach to metric formation adopted by the Manchester Metrics Group, working with relevant experts and practitioners, to develop outcomes and metric statements that could capture the quality of product and process of more participatory work, much of which of course is done with children and young people.

4.1.2 Quality of cultural leadership

The Manchester Metrics Group felt that another important dimension of quality is that of cultural leadership, which for them had four key elements:

- Clarity of objectives/alignment with mission.
- Integrity.
- Independence.
- Local impact.

Their view is that when these factors are absent, cultural organisations tend to manifest a wide range of dispiriting symptoms:

- No appetite for creative risk.
- Following funding.
- Confused aim/mission.
- Patchy artistic results.
- Weak external relations.
- Loss of trust.
- High turnover of staff, audiences and partners.
- Lower leverage of finance and networks.

The flipside is that where an organisation is benefiting from high-quality cultural leadership, you witness a sense of vibrant independence, loyalty, creative and commercial success, and the resilience that flows from all of these characteristics.

Therefore, the Manchester Metrics Group came to the view that assessing the quality of cultural leadership is a vital issue for the ongoing development of individual cultural organisations, and for funders and investors.

More work is required on how best to assess these quality of creative leadership outcomes using refined metric statements. For example, the greater majority of the suggested outcome areas (clarity of objectives; independence; integrity) would be for peer assessment only, and peers carrying out an assessment would require reasonably detailed knowledge about a given organisation and its creative practices and approach. Only one of the suggested outcomes areas for cultural leadership – 'local impact' – could be assessed by both peer and public respondents.

4.1.3 Organisational health

As noted in Chapter 2, the Manchester Metrics Group, having developed outcomes areas for cultural leadership and reach (quality of relationships and connections), came up with the idea of combining these outcomes areas alongside financial metrics to create a powerful dashboard for organisational health.

The group felt that separating out assessments about the quality of creative work from assessments about organisational health and resilience would bring welcome clarity to self-assessment and reporting processes. The Manchester Metrics Group's recommendations here are very interesting for a number of reasons.

Firstly, the Culture Counts system, which will be used to test the metrics with self, peer and public respondents, is built on the basis that cultural organisations will want to combine 'instrumental' data – such as financial information (earned income , such as box office takings, fees etc) – with their returns on the core metrics for quality. The real-time nature of the data reporting will make it easy for cultural organisations to embed the data from these dashboards of measures in both strategy planning and day-to-day decision-making.

Secondly, judgments on the leadership and governance of organisations are commonplace in most public audit processes across the third and public sectors. There is therefore some merit in exploring whether a peer review-based dashboard of measures on organisational health, supported and adopted by a wide range of co-investors (Arts Council England, trusts and foundations, local authorities), could form part of a light-touch evaluation system for the cultural sector. As the Manchester Metrics Group suggest, if an organisation has been rated as exemplary in terms of its organisational health (and wider performance in terms of quality of product and experience) then it could be subject to a less onerous reporting regime for a funding cycle than an organisation which is struggling across the same rigorous dashboard of measures.

Thirdly, whether or not these organisational health metrics formed part of a cultural organisation's formal reporting requirements from a funder, many of the suggested outcomes (including some of the outcomes for the quality of creative processes) are directly relevant to a cultural organisation's self-evaluation and annual planning cycles.

In this sense, it is important to keep in mind the distinction between those metrics that cultural organisations might publicly report against, and those that may form part of an internal self-evaluation process. The number of core metrics capturing the quality of cultural product and experience that are answered by self, peer and public respondents is likely to remain quite small (between five and 10 metric statements), so as to maintain their applicability to all artforms and cultural experiences and in terms of peers and public being able to assess the metrics equally well.

However, there may be additional sets of peer-only questions, and creative process questions for artists, producers and collaborators, that tell a rich value story, but which are primarily used for internal self-evaluation and improvement processes.

All of which underlines the importance of the whole dashboard of measures that have been developed by the Manchester Metrics Group, rather than just a narrow focus on the headlines metrics for quality of product and experience.

4.2 Future development issues

The scope and remit of this pilot meant that certain issues couldn't be explored in more depth. The future development of the metrics and the testing system could usefully focus on a number of key areas:

The differences between performance-based and exhibition-based cultural experiences

The Manchester Metrics Group discussed at some length the differences between performance-based and exhibition-based cultural experiences. There were a number of vital elements here.

The group were interested in how far performance-based works and exhibition-based work create a similar range of public responses from the respective audiences. This relates to both the difference between the two types of experiences, and the different contexts in an exhibition experience between a permanent display and a particular time-limited show. So, for example, will regular visitors to a gallery or museum respond very differently to the metrics when asked about the permanent displays as opposed to a particular time-limited show? All of these inter-relationships and points of comparison can be explored in the next testing phase of metric development.

One possible future development would be to develop specific additional outcomes and metrics on performance- and exhibition-based cultural experiences to supplement the core shared metrics set on quality of cultural product and experience that is designed to operate in all contexts.

Children and young people's work

The Manchester Metrics Group did not task themselves with the responsibility of developing the quality outcomes in ways that would specifically work for

children and young people. The instinct of the group is that the key outcome areas for quality of cultural experience (that is, metric statements to be developed in the outcomes areas of feelings, attitudes, behaviours and understanding) would lend themselves just as easily to children and young people audiences as to adult audiences.

At a later stage in the development of this approach, as the core outcome set and matching metric statements become more defined, work could be carried out to test the metric statements with young people to check their response, and specific metric statements could be developed for younger children.

However, it is also important to note that this type of approach is only one way to measure the quality of creative experiences. It may be that particular types of children and young people's work, particularly participatory productions, will be better assessed using complementary qualitative evaluation techniques.

Chapter 5: Conclusions

The overarching aim of this project was to test whether a group of cultural and creative practitioners could forge a consensus on key outcome measures for quality and reach.

This was a significant test given that the Manchester Metrics Group was drawn from a range of different artforms, including museum and exhibition environments as well as traditional performing arts activities.

Based on that overarching aim, the project has successfully met its main objective and has generated a number of important insights.

5.1 A dashboard of measures for excellence

The Manchester Metrics Group were very clear that 'excellence' as an outcome measure is definable as an absolute standard ('the best of its type anywhere') but questioned whether the current artistic assessment system has the necessary resource and underpinning expertise to assess this outcome measure consistently and robustly.

They suggest that, taken together, the dashboard of measures they have generated for quality of cultural product and experience (and indeed for quality of creative process and cultural leadership) constitutes a rigorous and robust way of measuring 'excellence' across the arts and cultural sector. Their arguments here feel compelling, and it is comparatively easy to see how the dashboard of measures suggested scan effectively against the evaluation requirements of key public funders (including ACE and local authorities) and major trusts and foundations.

The Manchester Metrics Group is very clear that the metrics framework isn't a replacement for current internal or external key performance indicators, or indeed more in-depth processes of peer review, but rather should be seen as a powerful additional tool to be used alongside these, and one that has the potential to provide (in due course) a relatively cost-effective means for cultural organisations to provide themselves and others with useful large-scale data on the quality of their work over the course of a year, and on how their own assessment of quality corresponds with assessments of informed peers and their audiences.

There is clear potential for this approach to simultaneously:

- build a credible and concise set of core metrics to measure quality, producing generalisable data from standardised metric statements,
- offer new opportunities for public feedback and response on their cultural experiences, and
- reduce the reporting burden on cultural organisations while enabling them to tell a richer value story about the work they do.

5.2 The importance of triangulating self, peer and public response

One of the most important insights from this pilot project is that this type of approach and metric system is not a crude 'rotten tomatoes'-type review mechanism for the arts and cultural sector, but rather a mechanism which is trying to understand the range and complexity of self, peer and public response, and the complex interplay between the quality of a piece of work and reactions from the public.

So for example, the group discussed how a piece of work that they expected to receive high scores from peers on dimensions such as risk and originality might be more likely to 'split' an audience, with some responding very positively and some very negatively. In other words, the standard deviations for public scores on these dimensions might be significantly higher than for a less challenging piece of work.

The group became excited that this metric approach and the suggested dimensions would be able to capture these dynamics of peer and audience response. They noted that the interplay between peer and public response could demonstrate that an excellent piece of work (judged on the basis of peer response to the dashboard of quality measures) could provide a range of public responses, which in turn would help illuminate that if a member of the public does not enjoy an event or show, this does not mean they have had a bad cultural experience.

Indeed rather the opposite may be true. The Manchester Metrics Group discussed how if an audience displays strong split reactions to a piece of work, recording both strongly positive and strongly negative scores on the quality dimensions, this could imply that the audience members have had a more immersive and impactful cultural experience than at a show which produces a majority neutral response to the quality dimensions.

These dynamics and relationships need to be explored through large-scale testing of the metrics and the system. For example, further testing will allow us to understand which of the quality metrics and statements are effectively capturing a diversity of peer and public response and meaningful insights into the intensity of peer and audience experiences.

5.3 Conclusions

The most significant challenge of this project was presented by the very first task: to develop and agree a set of outcomes and rough metric statements for assessing the quality of very different arts and cultural events. Overall, the co-production process worked very well and it sparked a number of discussions about what constitutes quality in different contexts that were valuable in their own right.

The outcome areas developed in Manchester were very similar to those produced in Western Australia, particularly in the areas of Excellence, Originality, Risk and Relevance, and we feel confident that any other group of

cultural professionals going through a similar process would not end up with a set of metrics that were wildly different to those developed here.

The necessary next stage is to take the suggested outcomes areas for quality of product and experience, quality of creative process and quality of cultural leadership, and begin to develop standardised metric statements for each of the outcome areas which can then be tested via self, peer and public response.

What is exciting about the progress already made is that it has opened up the possibility of creating quality metrics which have a high level of credibility among the cultural community, and which can be used to create standardised, high-quality, large-scale data on quality and other key aspects of cultural value. This is of huge significance to cultural organisations and funders alike who have a common cause in being able to demonstrate and explain the quality of the work being created, and the depth and significance of audience response and experience.

Appendix 1: The Manchester Metrics Group consortium members

The Quality Metrics Working Group

Maria Balshaw (Manchester City Galleries/Whitworth Art Gallery)
Cathy Bolton (Manchester Literature Festival)
Graham Boxer/Russell Miller (Imperial War Museum North)
Matt Fenton (Contact Theatre, from Oct 2013)
Sarah Fisher (Chinese Arts Centre)
Jim Forrester (Manchester International Festival)
Jean Franczyk (Museum of Science & Industry)
Fiona Gasper (Royal Exchange Theatre)
Roddy Gauld (Bolton Octagon)
John Knell (Intelligence Agency)
David Martin (Oldham Coliseum)
Steve Mead (Manchester Jazz Festival)
Nick Merriman (Manchester Museum)
Dave Moutrey (Cornerhouse/Library Theatre/Home)
John Summers (Hallé)

Appendix 2: Manchester Metrics Group agreed communication prior to the second stage testing pilot

Metrics for the arts: The Quality Metrics Pilot

Current situation

The Quality Metrics Pilot is a Manchester-based project which is exploring the practicalities and possibilities of a sector-led metrics framework to capture the quality and reach of arts and cultural productions. It has the potential to form the basis of a way of providing an account of quality which has both the confidence of funders, and of the sector, in that it measures what we wish to be measured, and enables us to tell a richer story about the value of arts and culture.

It takes its inspiration from a project initiated in 2010 by the Department of Culture and the Arts in Western Australia, which commissioned consultants Intelligence Agency and Pracsys to work with arts organisations to develop a metrics system which uses a combination of self, peer and public assessment to capture the quality of arts and cultural work.

The potential of this work led a group of 13 Manchester cultural organisations to come together in summer 2013, with Arts Council England support, to use Intelligence Agency to undertake the same process with them to explore whether, in principle, it would be possible to develop a commonly agreed set of quality indicators.

From initial scepticism across the CEOs representing festivals, orchestras, theatres, museums, galleries and combined arts, we found ourselves increasingly enthused by the project. By September, we found broad agreement on an outline framework which looked at quality across a dashboard of seven dimensions:

- Quality of product.
- Quality of experience.
- Quality and depth of engagement.
- Quality of creative process.
- Quality of cultural leadership.
- Quality of relationships and partnerships.
- Financial metrics.

The first four relate to the quality of specific products, while the last three relate to organisational health.

Each dimension is assessed through a series of statements to which assessors (self, peer or public) are asked to indicate their level of agreement. Some questions (e.g. relating to quality of product) will be assessed by all three groups, while others (e.g. relating to quality of cultural leadership) will be assessed by self and peers only.

Next steps

Having developed the framework above and drafted an initial series of questions, the next stage is to refine the metrics, and test them in the field. A second phase of the Quality Metrics Pilot is currently underway, with support from Arts Council England and the Audience Agency. This will see further work on the questions and the development of the survey instrument, and its application at eight arts and cultural events or productions in the North West.

The currently preferred instrument by which self, peer and public assessments will be captured is through an app which is administered at each venue by trained personnel using tablet computers. The responses are immediately loaded to a web portal which will be able to produce aggregated data.

The timeline for this work is to refine the metrics by mid November 2013, undertake the trials at the eight events by mid-December, and produce a report on findings by early January.

If the trial shows that the metrics framework works in practice, the next step would then be for it to be trialled at a national scale, to ensure that all kinds of arts and cultural production can be accommodated.

The Manchester Quality Metrics Working Group

Appendix 3: Notes from 30 April 2013 Manchester Metrics Group meeting

John Knell's detailed notes of the Manchester Metrics Group session of 30 April 2013

Introduction

JK shared a brief context setting presentation to kick off the session.

The key slide in terms of setting the parameters for our group discussion follows below in Figure 1:

Figure 1: 'Landing lights' for possible outcomes under quality and reach

Quality	Reach
Product	Audiences (number, diversity, type of connection)
Process	Platforms for collaboration/sharing
Experience	Physical / virtual

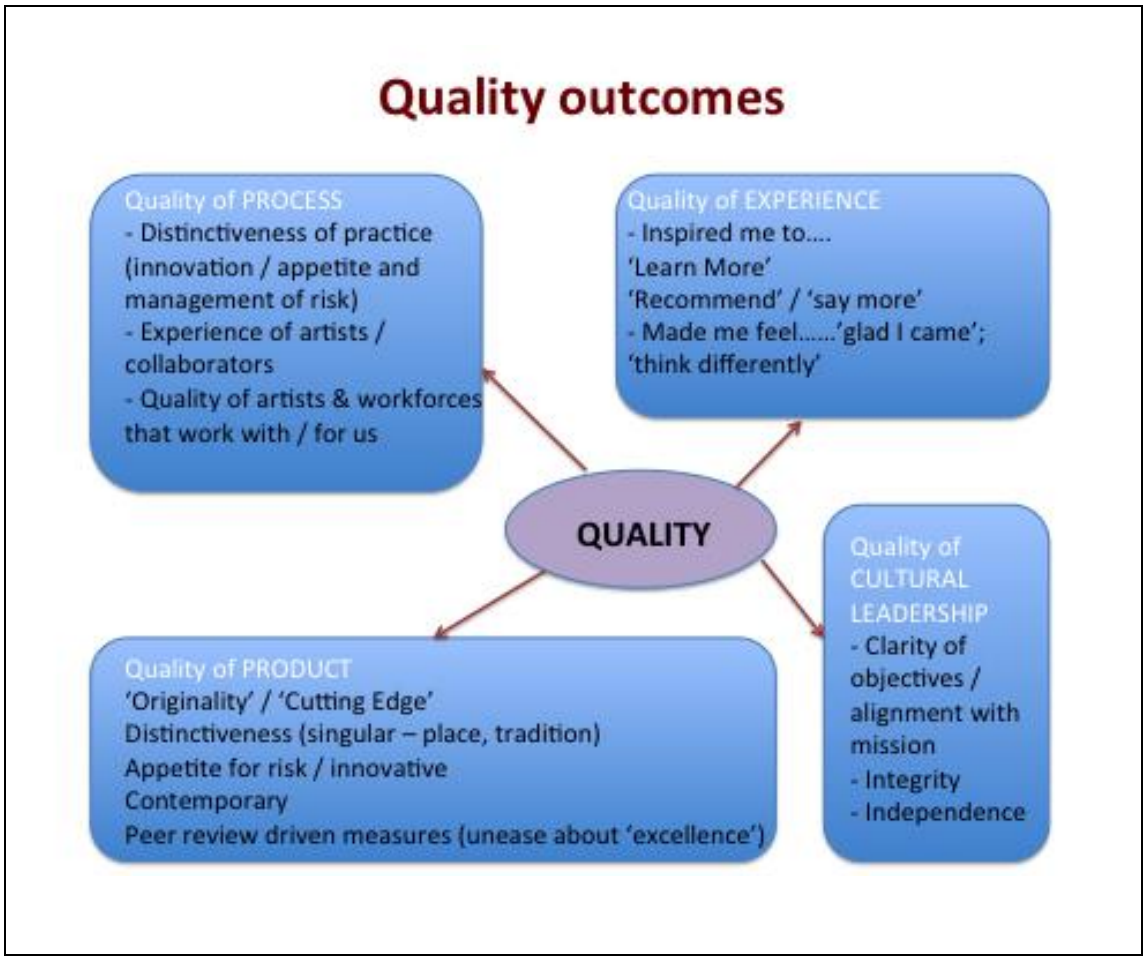
The ensuing discussion ranged widely in terms of defining quality, reach, impact and value.

Very quickly some clear outcomes emerged under the 'quality' and 'reach' categories.

1. Quality discussion

Figure 2 below summaries the overall map of the key outcomes discussed for quality.

Figure 2: Key outcomes areas for 'Quality'



Under quality it was quickly agreed that:

- Quality has to encompass both audience outcomes and artist outcomes – so support for a focus on product, process and experience dimensions.

1.1 Quality of experience

We discussed a whole cluster of outcomes under quality of experience:

- Life enhancing / memorable.
- Learning experiences that are inspirational.
- Experiences that provoke curiosity.
- Is it engaging / is it interesting.

These translated into some key outcome type measures for quality of experience. Some of those identified by the group included:

- 'Learnt something new.'
- 'Want to learn more.'
- 'Made me think differently.'
- 'Inspired me to: recommend; say more.'

- ‘I feel this museum is a place for me’ – which relates to a sense of ownership – to feeling welcomed and comfortable.’

We also discussed how the ‘when’ is very important to capturing different kinds of emotional responses (the ‘when’ of asking and evaluating).

So for example asking audiences ‘was it the most memorable thing you’ve seen this week / month?’

The group noted that what audiences do afterwards – in terms of talking about it; recommending what they have seen – is also important.

It was also noted in the galleries and museums sector that people often take the time to write very detailed comments and commentaries in the visitor books about how they feel about the museum or about a particular show or visit.

1.2 Quality of process

We discussed a range of key outcomes under quality of process – all focusing on the distinctiveness of the creative practice, and the experience of artists and collaborators. So possible outcomes areas for practice included:

- Distinctiveness of practice.
- Innovation.
- Appetite for risk/management of risk.
- Creativity.

In terms of the quality of artistic experience for artists and collaborators, everyone agreed that the curator/artistic experience is vital – ‘what do they say after?’ – linked to a sense of ‘artistic ownership’.

The group identified a number of groups whose experience is important when measuring the quality of the creative process:

- Artistic experience (there is a talent development dimension here).
- Artisan/theatre-maker experience.
- Collaborator experience
- Collector experience
- Co-producer experience.

1.3 Quality of product

The group discussed a number of key outcomes areas in terms of the quality of the product:

- ‘Originality’/‘cutting edge’ – exploring new possibilities and views.
- Distinctiveness (singular – place, tradition).
- Appetite for risk/innovative.

- Contemporary.

With regard to the ‘excellence’ concept, the group discussed excellence as applied to product – and for this to have meaning it has to be a peer-reviewed driven measure. Everyone has to have a clear understanding ‘of what good looks like’.

There is a lack of confidence that ACE has the resources, and therefore access to the necessary scope of expertise to drive an adequate, internationally robust, peer-reviewed measure of excellence in a quality of artistic product sense.

1.4 Quality of cultural leadership

Everyone felt that another important dimension of quality is the quality of cultural leadership – this had a number of elements:

- Clarity of objectives/alignment with mission.
- Integrity.

When this is absent, there are lots of obvious symptoms and signs:

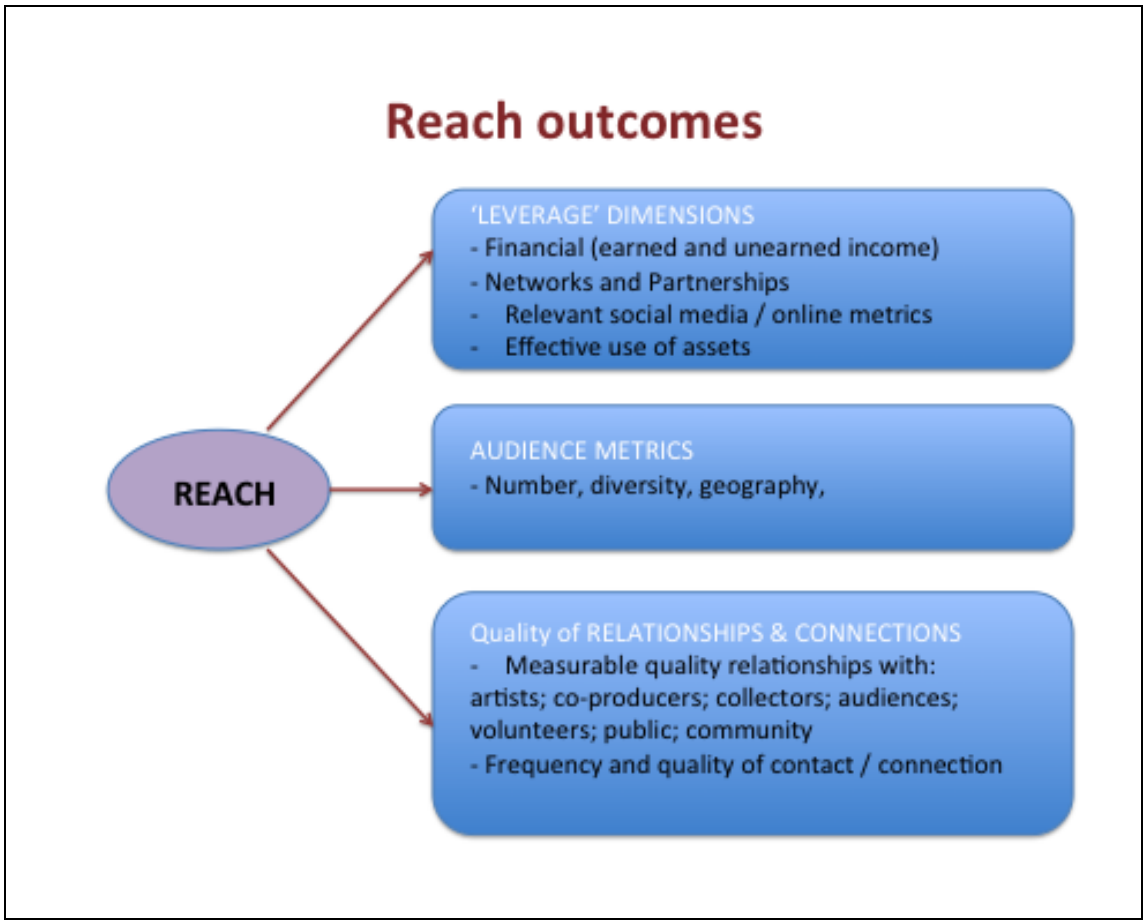
- No appetite for creative risk.
- Following funding.
- Confused aims/mission.
- Patchy artistic results.
- Weak external relations.
- Lost trust.
- High turnover of staff, audiences, partners, audiences.
- Lower leverage of finance and networks.

The flipside is that where there is evident high-quality cultural leadership, you get loyalty, a sense of vibrant independence and the resilience that flows from all of these characteristics.

2. Reach discussion

Figure 3 below summarises the overall map of outcomes discussed under ‘reach’.

Figure 3: Key outcomes areas for 'Reach'



It was quickly taken as a given that there will be a number of audience-based metrics for reach (they were taken as hygiene factor – as they're already so embedded in current measurement activity). The group discussed the need to break down 'audience' into meaningful categories – not just in terms of engaged and unengaged; but also distinct communities of interest (e.g. teachers, community arts groups, etc).

We also discussed the difficulty of defining engagement – 'what does 'taking part' mean?' Should we let users define engagement more? For some, engagement has to 'be more than coming to see a show' – has to imply some quality of connection in terms of the depth and intensity of experience.

There was also some discussion about some of the measurement challenges with regard to online experiences. For example, in engagement terms a unique user statistic is less revealing than data on the length of duration of online experiences.

There was agreement that 'financial leverage' outcomes and metrics are one important component of 'reach' – but the group discussed how any set of leverage metrics needs to be relevant to scale of the organisation or activity – and the expected benchmark for outstanding performance would be different by scale of organisation or activity.

The group identified ‘networks and partnerships’ as another vital measure of reach, as a powerful proxy for both quality and influence. These are outcome measures on which to date there has been much less formal focus across the cultural sector.

Another important aspect of reach is the quality of relationships and connections built by any cultural organisation. So, for example, these might include the quality of their relationship with artists, volunteers, public and their workforce. The quality of these relationships could be measured in a number of ways including:

- the quality of their workforce,
- the quality of the artists who decide to come and work with them,
- the quality of the opportunities being created for creative collaborations/practice, and
- the frequency of contact/loyalty of relationship with audiences.

This led into a discussion about community connection and the extent to which it’s possible to measure how much a community ‘loves’ a particular cultural organisation.

There was also some discussion about the effectiveness with which organisations use their assets. The rationale here being that a higher quality or higher performing organisation would be able to give a clear account of ‘how effectively they are deploying the assets they have at their disposal’.

These types of measures might be important, in conjunction with the other quality metrics, in being able to demonstrate how far an organisation ‘is getting the balance right between artist and audience’ – ‘between artistic success and commercial success or resilience’.

John Knell
May 10th 2013

Appendix 4: Notes from 14 May 2013 Manchester Metrics Group meeting

John Knell's detailed notes of the Manchester Metrics Group session of 14 May 2013

Manchester Metrics Pilot – Second Session – May 14th

Introduction

JK reviewed outputs of last session (as per circulated paper) – and asked the group what was missing or needed emphasis or alteration.

Discussion

Quality of product (finish) was mentioned.

'Technical proficiency' (which was felt to be part of 'artistic process' measures).

Appropriateness of executive/finish/'realisation' (as part of 'quality of product' measure).

In other words, whatever the critical or public reaction, was the project realised as envisaged and was the project well executed?

Measure the starting point

'Measure their base line.'

The 'first time question' is important – 'Is this the first time …? etc.'

Manchester Museum asks this question – 'Is this the first time at the museum?'

We talked briefly about Manchester Museum's Playful Museum project (part of the wider Happy Museum project) – which led into a broader discussion about the need to try and capture a broad range of expression/reaction in questions exploring 'quality of experience'.

The key element of the discussion was that cultural experiences don't always have to be illuminating or transformational (and there's a tendency in evaluation work to 'assume' that these are the most important outcomes).

It's OK for the experience 'to be pleasant'.

All of which links to the wider wellbeing agenda/measures (mention was made of NEF's 'five ways to wellbeing' – see Figure 1 below).

For the cultural organisation, some of the important elements here are about participants and visitors 'feeling at home' and 'trusting the organisation'. These are important elements of capturing the loyalty of cultural consumers. These types of measures also link to the integrity and brand essence of the organisation.

Figure 1: NEF's five ways to wellbeing

Connect...
With the people around you. With family, friends, colleagues and neighbours. At home, work, school or in your local community. Think of these as the cornerstones of your life and invest time in developing them. Building these connections will support and enrich you every day.

Be active...
Go for a walk or run. Step outside. Cycle. Play a game. Garden. Dance. Exercising makes you feel good. Most importantly, discover a physical activity you enjoy and that suits your level of mobility and fitness.

Take notice...
Be curious. Catch sight of the beautiful. Remark on the unusual. Notice the changing seasons. Savour the moment, whether you are walking to work, eating lunch or talking to friends. Be aware of the world around you and what you are feeling. Reflecting on your experiences will help you appreciate what matters to you.

Keep learning...
Try something new. Rediscover an old interest. Sign up for that course. Take on a different responsibility at work. Fix a bike. Learn to play an instrument or how to cook your favourite food. Set a challenge you will enjoy achieving. Learning new things will make you more confident as well as being fun.

Give...
Do something nice for a friend, or a stranger. Thank someone. Smile. Volunteer your time. Join a community group. Look out, as well as in. Seeing yourself, and your happiness, linked to the wider community can be incredibly rewarding and creates connections with the people around you.

There was interest expressed in measuring the changing relationship with people/cultural consumers over time.

All of which raises wider issues about how an organisation or event locates an individual's consumption of a particular event or show within their cultural consumption wider profile – so for example:

A question used at the Literature Festival is – 'how many other literature events have you attended this year?'

Cultural experience issues

We had a discussion about how not enjoying an event or show does not mean it was a bad cultural experience.

Indeed rather that opposite – a powerful reaction either positively or negatively is better than the majority responding in the middle of a three- or five-point Likert scale. The group agreed that there is something important about this dynamic that needs to be better captured.

It linked to a discussion that there is always the danger of inadvertently creating a 'hierarchy of engagement' – implying our ambitions can be captured by a small group of people who are 'fully engaged' – with connotations of 'Victorian improvement'.

The group talked about the social dimension and social capital elements of the experience – for example the question: 'is it something you do with others?'

Then, with regards intensity of experience, we talked about the 'talk about, share/recommend' aspects of cultural consumption, which are important reach elements:

- Did you Tweet about it?
- Did you Retweet?
- Did you take a photograph?
- Did you upload a video on YouTube?

We discussed the challenge of capturing what people learned – around the suggestion that the question 'I want to learn more' is not comprehensive enough – and we talked about: 'I learned something new' and other categories here.

The key emphasis in this discussion was about measuring a breadth of experience and engagement.

The group also stressed the importance of having questions that work for children – which would be a matter for subsequent iterations of the metrics and testing with groups of children and young people.

Place dimensions

The group discussed the importance of place – noting that cultural organisations in Manchester (and no doubt elsewhere) have a distinct 'ethos of generosity' – celebrating our community and our audiences. Displaying a sensitivity to place and 'context' is important.

These civic connections and civic leadership are an important element of our offer and brand.

So place dimensions and connections need to be part of the metrics.

Language and expression

The group discussed the issue of language – that it is important that we can come up with something that will inspire us. The trouble is that the language that we use around all this stuff, and the words so far used to summarise our key outcomes and metrics, are not inspiring

The challenge is how to do this and avoid 'pseudo arts bollocks'.

It was noted that the problem with the headline categories for outcomes that we've ended up with is that they are shorthand statements for much richer conversations which have been compressed into these headline statements – and at the next session we need to go back into the detail of those earlier questions.

So how we define the metrics, in an inspiring way, and how we ask for feedback about what we've done is going to be vital.

It was agreed that at the next session we should frame the metrics by drafting them in the format we want to finally ask the public – with design rules around simplicity, plain English etc.

So, for example, we should be asking ourselves what do we want peers, ambassadors and the public to say in the pub about the experience:

- I had a quite a nice time.
- That was better than staying at home and watching…

The point was also raised that aren't we looking from an engagement point of view for a cultural experience to elicit either strongly positive or negative responses (should they score higher than the mediocre middle?).

This led into a discussion about the fact that as a group we're also interested in what audiences think about these metrics – how they might define these elements (which JK noted would be a natural part of any testing phase of the metric set – but probably not for this stage of this pilot).

Taking stock and next steps

In the last 45 minutes, we took stock of where we'd reached after this second session.

We discussed 'how to measure' and 'who measures?'

It was noted that organisations have very different capabilities and capacities in terms of their ability to measure.

The group asked:

- What will the support look like to make any new metrics system work?
- What would it mean to use this metric system / process. What are likely to be the problems and issues?

JK noted that the whole idea of this initiative (and the co-produced metrics project in Australia) is that it leads to less onerous reporting demands on cultural organisations (in other words, any metrics that may get supported out of this project by ACE or other funders, will not just be added to what you already report on). This is about measuring your intentions better – your vision of what success looks like in terms of quality and reach.

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