



CULTURAL LEADERSHIP

Toolkit

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READING SUGGESTIONS:

We recommend that you download the publication and open it using a pdf reader. You can then click on the web links and consult the resources. Alternatively, you can also copy and paste with a right click the web links of the resources that interest you in your browser's URL field. As this publication is quite long, we advise you not to print it, especially since all resources are web-based.

SHIFT PROJECT COORDINATOR:

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THIS IS SHIFT

The 17 [Sustainable Development Goals \(SDGs\)](#) were adopted by all UN Member States in 2015 and are the 'to-do list' for the entire world until 2030. The aims of these SDGs 'are to end poverty, protect the planet and improve the lives and prospects of everyone, everywhere'. Although culture and arts have not been integrated as an explicit goal, we believe that the cultural and creative sectors have a key role in shaping the transition to more environmentally, socially and economically sustainable societies without leaving anyone behind. Culture and arts are fundamental and transversal in their capacity to support behavioural changes and mobilise collective engagement. As we still demand culture and arts to be integrated in the international agenda post 2030, its role can already be integrated by promoting knowledge to citizens as well as being a tool of the successful implementation of all the 17 SDGs and its targets.

The project SHIFT - Shared Initiatives For Training, co-funded as 'Strategic Partnership' by the Erasmus+ Programme of the European Union, was initiated by nine cultural networks:

- European Choral Association – Europa Cantat - ECA-EC
- ELIA - globally connected European network for higher arts education
- European Music Council - EMC
- European Union of Music Competitions for Youth - EMCY
- Fresh Arts Coalition Europe - FACE
- IETM – International network for contemporary performing arts
- International Music Council - IMC
- On The Move - OTM
- Trans Europe Halles - TEH

These networks recognised the need to join forces to work on the global agenda of the 17 UN Sustainable Development Goals and its leaders wished to improve their capacity for giving guidance to their teams, organisations, and members.

It was asked how to tackle the global challenges recognised in the SDGs such as climate change, gender equality, and inclusion of minorities.

Although these challenges are not new and have been part of the work of the SHIFT partners for a long time, it was agreed by the participating organisations that these topics were not yet taken from a leadership point of view. Three SDGs have been selected as starting points to activate change and increase the cultural sectors' awareness on the sustainable goals:

- SDG 5: Gender Equality
- SDG 10: Reduced Inequalities
- SDG 13: Climate Action

Even though the partners have decided to focus on three SDGs, there is a clear connection between these SDGs. Working on achieving one goal will have a positive impact on others such as good health and well-being (3), decent work and economic growth (8), sustainable cities and communities (11), life below water and on land (14 and 15).

At the same time, the partners are aware that there might be conflicting recommendations to achieve the different goals. To give a very simple but vivid example: One graphic style might be particularly eco-friendly because it would use a very small amount of ink and be produced with less energy, but the same style might not be barrier-free and might be difficult to read for people with visual impairments. All the recommendations therefore have to be contextualised and used with high sensitivity.

The overarching work on cultural leadership has enabled the partners to develop and discover various ways of leading and supporting change to achieve these goals. It was crucial to give tools to leaders to be able to weigh out values and find a path making sense for their organisation, at the time of taking the decision while being aware of different other paths possible.

The partners are happy to share with you the researched and developed material on the four themes of SHIFT: cultural leadership, environmental sustainability, gender and power-relations, and inclusion. **Enjoy!**

ABOUT THIS TOOLKIT

This publication is the second publication of the Cultural Leadership package of the SHIFT project; it has been developed together by Trans Europe Halles and the SHIFT partners.

This publication is not meant to be a textbook, but a collection of resources, tools, tips and links to relevant material about cultural leadership. The idea is not to reinvent the wheel, or re-phrase already existing literature, but to offer a handy toolkit for the reader looking for specific aspects of cultural leadership, or for more resources or tips or learnings by other cultural leaders.

This publication follows and uses an earlier publication: The [Cultural Leadership Annotated Bibliography](#), a collection of more than 50 handpicked resources on Cultural Leadership. It is the result of curating different resources on Cultural Leadership, including those of the Annotated Bibliography.

The resources offered, the text included and the tools suggested in this publication come from a wide spectrum of expertise and learnings, from SHIFT partners as well as other cultural operators and research projects. We cover seven topics that we think are essential to cultural leaders to know more about, read and be exposed to different types of practices.

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1

CULTURAL LEADERSHIP

Definitions of Cultural Leadership

There are many definitions of cultural leadership.

Here are few of them, which we find relevant to understand the concept:

- Cultural leadership is the act of leading the cultural sector which is practised in two different ways; **managing a cultural organisation**, ensuring that they are financially viable, legal and with well-organised staff, and **leading culture itself**, making work, productions and projects which show different ways of thinking, feeling and experiencing the world - bringing dynamism to the economy and wider society.¹
- Cultural leadership is moving from just administration to becoming cultural entrepreneurs, turning good ideas into good business².
- Cultural leadership is outstanding individuals and organizations pursuing the goal of making art.³
- Cultural Leadership is a qualifier for the way cultural actors and organizations relate to their environment.⁴
- Jonathan Price describes three types of cultural leadership: 'entrepreneurial cultural leadership (centring on the interests and operational success of a project or organisation, at whatever scale of operation); generous cultural leadership (prioritising the needs of the cultural form or sector, extending efforts beyond individual or organisational interest); and public cultural leadership (relating to wider societal influence and involvement in the public realm).⁵

Some other aspects that could help understanding the meaning of cultural leadership are:

- **Leadership vs. management:** cultural management is the basis. Cultural leadership implies additional responsibility including leading the organisation's vision, taking risks and managing change, to name a few. While there can be management without leadership, there is no leadership without management.
- **Internal vs. external:** cultural leadership can be directed towards the inside of the organisation; leading people and/or developing a vision or strategy for the future development of the institution. It can also be reaching out beyond the borders of a given project or organisation.
- **Individual vs. hierarchical vs. distributed:** leadership is moving from individual leadership to more relational perspectives; a hierarchical relation between a leader and followers or as distributed within a number of people without the hierarchy of leaders and followers. (check section Shared Leadership).

How Cultural Leadership Changed Over Time

The past years witnessed a change in the understanding of cultural leaders and their function in the organisation and society.

In an [interview](#)⁶ with Hilary Carty, the Director of [Clare Leadership](#), she says that cultural leadership has changed from what it was before:

- Cultural leaders can no longer have long-term plans;
- Cultural leaders need to keep their vision flexible, adaptive and responsive to external changes;
- Cultural leaders need to accept less predictability and control in their work;
- Cultural leaders need to be more visible in the public sphere and say what they think and what they appreciate.

While Johan Kolsteeg and Martin Zierold mention another change: 'Leadership is no longer the task of one lone or some few individuals, but it becomes an emerging phenomenon through the interconnected practices of people within and outside the organization. But at the same time, cultural-leadership- as-way-of-connecting does not imply that deliberate managerial and strategic action is no longer relevant. It is from this strategic action that leadership emerges, e.g. by opening up paths for an organization to undergo the cultural change towards more openness.'⁷

|| *The center of attention turns away from the visionary leader and towards a community-oriented understanding of shared leadership that does not have to be neutral or universal, but is aware of its subjectivity and dependence on group identities and values. It is a new figure, adaptable, able to foster relationships, share power and forgive failure.* **||**

Mapping the meanings of Cultural Leadership, by Johan Kolsteeg and Martin Zierold.

Qualities of Cultural Leaders

Author and arts historian Anabel Roque Rodríguez believes that good leaders are:⁸

- Vision developers;
- Mentors who see potential and trust their teams to find new ways;
- Leaders who understand the interdependence of culture, ethics and life;
- Leaders who don't add to oppressive structures and remain rooted in substantial values. They establish a healthier workplace.

Other qualities of cultural leaders can be:

- Values and commitment: being true to ones-self and committed to organisations' vision, but also creating a work environment that is respectful, with zero tolerance for unacceptable behaviour.
- Self-Awareness: to be self-aware means being open to others' perspectives, admitting mistakes and sharing one's vulnerability. This gives the leader the chance to ask for help from those who complement their missing skills and knowledge.
- Trust: being collaborative turns a group of individuals into a team. Being flexible allows the leader to create a healthy environment where mistakes can be made and learned from. But it is trust that allows teams to be responsible for their decisions, distributing the burden of leadership to become a group's responsibility.
- Leading beyond authority: cultural leader's ability to build relationships outside the organisation to overcome limitations of organisational resources means that leaders have to influence rather than having direct authority.
- Risk Tolerance: cultural leaders face change constantly; they need to be prepared to deal and manage the changes and relevant risks. An agile approach, allows leaders to introduce or accept changes, manage them and adjust their plans/strategies accordingly.
- Responsibility: leaders need to focus on the economic (financial) sustainability of their organisations, as well as social and environmental sustainability.⁹

/// We need to redefine our thinking around what success looks like and how to translate that into cultural institutions. ///

Anabel Roque Rodríguez

Development of Cultural Leaders

Arts Council England identifies four core mechanisms through which leaders are developed:

- **Organisational Culture** is critical to developing leaders but remains under-recognised as a mechanism for leadership development. Where cultural organisations have the capacity, aspiration and skills to support the development of leaders, they can be highly effective by preparing and enabling individuals at all levels to lead through appropriate structures and mechanisms.
- **Structured learning** is the dominant form of leadership development, this model is generally self-directed or experiential, combining taught courses with elements such as customised training, mentoring, coaching and secondments.
- **Relationship-based development** offers valuable practical experience of 'learning by doing'. Coaching and mentoring are important mechanisms for individuals to reflect on and learn from their experience of leading through relationships with others. This can take different forms, including dual directional mentoring, where two individuals assist one another's growth.
- **Networks** can provide important support for both emerging and established leaders. For senior and executive leaders in particular, peer networks can offer a collective voice and safe space for problem solving and knowledge exchange.¹⁰

CULTURAL LEADERS TOOLBOX

On Cultural Leadership. Books you don't want to miss

Narratives by Cultural Change Makers:

collects interviews with ten experienced cultural leaders from various parts of the world, active in different countries, in different types of organisations and with different art forms. They present the challenges they face and their ways of dealing with them. Several leaders talk about how they exploit their creativity in their day-to-day work, as if their leadership role provided scope for a type of art all of its own.

Leaders Stories. Conversations with leaders in the European Independent Cultural Sector

This publication does not offer a «12 principles for becoming a better leader» handbook. Instead, it introduces you to some topics in Leadership from a very practical and action-based approach based on the personal experience of 11 leaders of independent cultural centres from Scandinavia and Latin-Europe. The interviews in this publication highlight the great diversity of independent cultural centres around Europe as well as their varied governance models, decision-making processes, the strong drive of the people behind them and the uniqueness of their leaders. The leaders talk about their personal motivations, their professional backgrounds, their leadership styles, their values and some of them even share some of their favourite management tools.

A cultural leadership reader

This reader aims at making the reflections of cultural practitioners more visible and accessible. It collects a series of articles by scholars and practitioners, through which we recognize that there are many ways of exercising, experiencing and indeed 'writing' cultural leadership.

Different voices and perspectives offer their reflections on cultural leadership in sixteen chapters, and explore the relations between leadership and race, relationships, partnerships, improvisation, practical knowledge, and crisis.

■ ■ *I think of myself as a gardener, I can grow people* ■ ■

Dame Steve Shirley about her leadership practice.

Barrett's Seven Levels of Leadership Consciousness¹¹

Conscious leadership is the leaders' ability to be present and aware and to bring their entire selves into their leadership position. There have been many ways to translate this concept into frameworks and models, Barrett's model is one of the most acknowledged.



Barrett's model named 'The Seven Levels of Consciousness' is a modification on Maslow's Hierarchy of Needs and it **should be read from the bottom up**. The central level 4 marks a transformative stage in the hierarchy. Below is the explanation for every level:

- Crisis Manager: Financial stability, organisational growth, and employee health and safety. Displays calmness in the face of chaos, and decisiveness in the midst of danger.
- Relationship Manager: Employee recognition, open communication, and conflict resolution. Creates employee and customer loyalty, and treats people with dignity.
- Performance Manager: High-performance systems and processes. Focus on strategy, performance, excellence, quality, productivity, and efficiency. Displays pride in performance.
- Facilitator/Influencer: Empowerment, adaptability, and continuous learning. Focus on personal growth, teamwork, and innovation. Displays courage, responsibility, initiative, and accountability.
- Authentic Leader: Strong cohesive culture, and a capacity for collective action. Focus on vision, mission, and values. Displays authenticity, integrity, passion, and creativity.
- Mentor/Partner Leader: Strategic alliances and partnerships, servant leadership. Focus on employee fulfilment, and mentoring and coaching. Displays empathy, and utilizes intuition in decision-making.
- Visionary Leader: Service to society, humanity and the planet. Focus on ethics, social responsibility, sustainability, and future generations. Displays wisdom, compassion, and humility.

Challenges Faced by Cultural Leaders

Some challenges are **common** between leaders in the cultural sector and other sectors, such as:

- Financial sustainability;
- Environmental sustainability;
- Engaging the digital connected, networked individuals.

Other challenges are **unique** to the cultural sector:

- Tough impact measurement: making meaning and communicating different forms of value is not measurable with traditional 'result' oriented assessment methodologies. Usually, a bottom line or the progress in solving a social issue is not the most important aspect of the cultural leaders work. They usually produce new ideas and products that have no precedence; hence, they need to inspire trust in the organisations' work/projects.
- No direct authority: cultural leaders have to work across networks to be able to complement their organisation's lack of certain resources such as finance, competence or knowledge. Being able to build rich and diverse networks of peers, funders and collaborators is becoming an essential skill for cultural leaders.
- Lack of freedom of expression: many cultural organisations create ideas and projects that might be seen as a threat to dictatorships and big businesses.
- Communication: cultural leaders need to find new communication strategies and tactics that allow their work to stand out in a world saturated with design, media and rich, complicated forms of communication.¹²

CULTURAL LEADERS TOOLBOX

Leadership and Governance - The Art of Leadership Podcast Series

Shared Leadership

One way to strengthen leadership is to share responsibilities. As Pearce says: 'In extremely changeable contexts with increasing numbers of challenges, leadership should be shared.'¹³ 'Shared leadership is an organisational structure and culture in which the entrepreneurship and innovative talents of all employees are stimulated by giving them autonomy in a context of accountability, learning opportunities and teamwork.

Shared Leadership can be implemented at several levels:

- Co-leadership (cf. the classic artistic-operational manager dyad);
- Serial or rotating leadership;
- Spontaneous leadership;
- Self-steering teams;
- Collective leadership without hierarchy and with maximal self-steering.¹⁴

Read an in-depth [Perspectives on cultural leadership](#).

Six Lessons About Leadership in Cultural Organisations

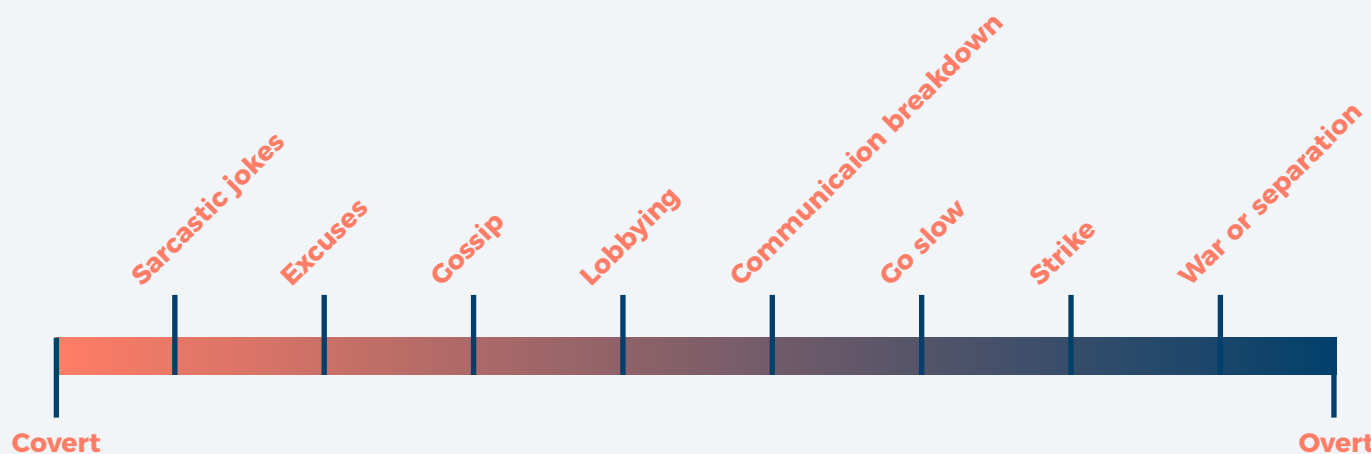
In his article [‘Leading cultural organisations: from leadership to followership’](#) Lars Lindkvist provides advice on how leadership can best be practiced in cultural organisations:

- **Lesson 1:** Base your approach on your unique experiences of leadership and skills, as the formula for appropriate leadership is in constant flux.
- **Lesson 2:** It is not either leadership or management, it’s both.
- **Lesson 3:** Specialised, sector-based leadership skills are preferable to general skills.
- **Lesson 4:** Appropriate leadership is context-specific and can be developed.
- **Lesson 5:** Assume different leadership roles when negotiating tensions between different stakeholders.
- **Lesson 6:** Shared, joint leadership can make things easier.¹⁵

Leading Through Conflict

One of the challenges leaders usually face is leading teams through conflict. In her article [‘Leading through conflict’](#), Anna Johansen Fridén comments on ‘Myrna Lewis’s model: ‘(The model) shows why it is important for teams to find constructive ways of ‘arguing’: **resistance that is not addressed is a ticking time bomb** that paralyses the work until the conflict has reached such a level that it leads to open warfare or separation. Lewis’s model in the graph below, shows the different forms of resistance from covert (not openly shown or shared) to overt (done or shown publicly). One of the **first signs of resistance** that is not explicit is **joking and sarcasm**; jokes that are not meant just to entertain but that contain **unspoken criticism**.

The next step on the line is **excuses**. Rather than clearly opposing a decision or an opinion, a person may give various reasons why something has not been done. The resistance which has been below the surface for a while is often also expressed as **gossip**; things are said to some people in the group but are not mentioned when everyone is present. The resistance gradually becomes more obvious and increasingly affects the work. Communication breaks down, colleagues deliberately hold up the work or even fail to attend important meetings. In the end, the conflict is in a state of open warfare or, there’s a **separation**: someone resigns, goes on sick leave or is forced to leave.¹⁶



Myrna Lewis's Model

Organisational Approach to Conflict Management

- Management needs to be prepared to tackle resistance at an early stage. This could be by responding to sarcasm and not getting involved in gossip.
 - It is important for everyone to help by taking note of hot spots and doing what they can to make sure that the group has the courage to explore them, thus bringing dissent to light at an earlier stage.
 - Each individual has responsibility for raising any dissent with their manager or with the whole group in a constructive way.
- It is important to take a step back and try to analyse conflict situations in a more complex way, for example by asking oneself questions such as: Am I projecting? Does this situation look different to us because we are in different positions in the organisation? Is the conflict mainly being created by the circumstances in which we currently work?.¹⁷

|| *Trust is created when we go through conflict and find a joint way forward.* **||**

Anna Johansen Fridén

Leaders Role in Conflict Management

- Leaders role is not to create security and harmony; it is to allow the group and the individuals in it to be part of a process in which the experiences they go through lead them to feel confident that the group can accommodate the range of opinions, thoughts, feelings and knowledge in every individual and in the group as a whole.
- The most important role a leader can play in that process is probably to be open to conflict and to try to see opposition and resistance as the expression of something important that needs to be understood, rather than something that interrupts the work and allows chaos to ensue. If the person leading the work is comfortable with the fact that conflict is natural and manageable, there will be less anxiety in the process. That in itself will lead to individuals and groups keeping sight of their own resources and being more able to relate both to themselves and to other people.¹⁸

CULTURAL LEADERS TOOLBOX:

Five Elements That Make A Great Team

An analysis made by Google, to determine what makes a successful team, can be very well applicable to cultural organisations:

1. Creating a safe environment helps teams take risks and make their voices heard which results in a free flow of ideas, healthy debate and better outcomes.
2. Accountable, reliable and trustworthy team members.
3. Having specific and clear performance standards allows teams to understand their function, purpose, expectations and performance objectives.
4. Creating meaning helps the teams succeed, whether it is meaning of the work itself or the product.
5. Teams want to know their impact, dedicating a reflection exercise on their impact is valuable for the teams.

Ref: Forbes article (2019) by Zack Friedman: Google says the best teams have these 5 things.

The Demand-Control-Support Model for a Healthy Workplace

‘Research has come a long way and has lots of advice to guide leaders. While there are several overlapping models giving roughly the same message, the Demand-Control-Support model of professors Karasek and Theorell sums it up beautifully: **we can all be healthy and motivated by rather high workloads, as long as we have control/influence/ discretion over how and when our work tasks are done; and we are doing it in a supportive, friendly-enough environment.**

If we have low control over our job such as when we have to do it in a way someone else has come up with, and we have to do it according to a schedule we can't influence we will be stressed, perform more poorly, eat more medications, have a higher incidence of depression and be more likely to quit our job.

Leaders can increase their team's well-being and decrease stress at their workplaces:

- By providing interesting but reasonable levels of work demands, giving the team high control over their work and high social support
- By being guided by what is workable in that it helps leaders move towards their organisation's valued direction in a sustainable way.¹⁹

“ *Being a leader is a bit of a lonely job.* ”

Stuba Nikula, former director, Kaapelitehdas (Helsinki, Finland)

Self-Care: Tips for Cultural Leaders

1. 'Get yourself a coach and work to create a space of real honesty between you, as part of that work include your self-care needs and think about why you need them in your role as a leader.'²⁰
2. Employ an organisational coach. That objective expertise maintains individual confidentiality but can give you anonymised temperature gauges about the overall self-care requirements and other human resource centred metrics of your organisation.²¹
3. Build self-care into your HR processes. For example, instituting self-care into appraisal systems, so that from the top down self-care was front and center in the organisational culture.²²

Trust is created when we go through conflict and find a joint way forward.

Anna Johansen Fridén

The Four Keys to Well-Being

Well-being is a skill that can be practiced and strengthened. Practicing the following four skills can help promote higher levels of well-being in our lives:

1. **Resilience:** the rapidity with which we recover from adversity.
2. **Outlook:** the ability to see the positive in others, the ability to savour positive experiences, the ability to see another human being as a human being who has innate basic goodness.
3. **Attention:** the ability to voluntarily bring back a wandering attention over and over again is the very root of judgment, character, and will.
4. **Generosity:** is when individuals engage in generous and altruistic behaviour.²³

How Managers Can Support Remote Employees

During crises in general, many additional and exceptional challenges arise. COVID-19 brought the challenge of remote work and how can leaders deal with:

- Staying connected with each team member;
- Helping manage their own and others' stress;
- Maintaining team morale and motivation;
- Running engaged meetings;
- Tracking and communicate progress;
- Helping their team shed nonessential work.

There are six strategies to augment availability to employees when working remotely:

1. Bridge distance through frequent connections;
2. Schedule virtual "office hours" for questions and informal conversations;
3. Provide stability through consistent rituals;
4. Set clear boundaries;
5. Ask employees to come forward with problems, not just solutions;
6. Enable capacity through feedback.²⁴

CULTURAL LEADERS TOOLBOX

From [Clare Leadership](#), 16 videos of cultural leaders, facilitators and trainers sharing ideas, tips, tools and strategies for leading effectively amidst current uncertainties

Leading from a distance

"

1. Go right back to basics. Focus on your purpose, vision and mission. Checking in with your vision and mission is critical, especially since the context is changing so radically. Getting this right, Moira says, helps you to prioritise. She also suggests revisiting how you used to do things: 'Do we need all that space? Can we actually become a more inclusive organisation as a result of a shift online?'
2. Connection is vital. Due to Covid19 crises, cultural leaders have been making tough decisions, and for that she thinks they need to connect to each other and to the cultural sector and come together more than ever to support individual leaders and 'to fight for what we believe in and what we need.'
3. Bouncebackability. says Moira borrowing this term which means that as the cultural leaders recognise the load on their shoulders, they need to find the tools inside of themselves to cope and build their resilience, and the confidence needed to practice iterative testing and adapting leadership.

"

Moira Sinclair, CEO- Paul Hamlyn Foundation.



2

CO-DEVELOPMENT AND CO-CREATION METHODOLOGIES

Co-creation Methodology

'Co-creation describes **joint or partnership-oriented creative approaches** between two or more parties, especially between an institution and its stakeholder, towards achieving a desired outcome. While **the term is sometimes used interchangeably with 'collaboration'**, co-creation places a greater emphasis on process. Similarly, emphasis is placed on creating conditions of equality among the different stakeholders involved in the creative process: the contributions of the different co-creators are equally valid.

A co-creation process can enable organizations to:

- find a connection between groups that would normally not collaborate;
- raise awareness and sensitivity towards important issues with certain groups/individuals;
- create a safe space for sharing;
- create a common understanding;
- enable the creation of more layered and nuanced exhibitions and events;
- build relationships between groups/individuals that exist well beyond the scope of a project.
- empower minority perspectives.²⁵

Civic Design

One of the co-creation design approaches is Civic Design, which is a practice that focuses on the common good outcomes of communities by pulling upon all of the institutional tools in our communities, beyond the traditional sole focus on government alone. It focuses on civic projects and is applied to achieve **collective solutions** designed for the good of a community.

'Looking at cultural leadership **beyond the inside of an organisation**, we can explore ways in which cultural **organisations can be leaders in their local contexts**. They can be so when they successfully engage with their territory to offer good cultural services and empower their communities.²⁶

Why is Civic Design Important for Cultural Leaders?

Civic Design can **support cultural leaders in the design and development of processes of collaboration** with multiple stakeholders and citizens for the improvement

Phases of the process are:

1. Co-define: collecting different stakeholders' perspectives, including those who will consume/use the outcome.
2. Co-generate: this is the ideation process where different stakeholders conceptualise the outcome and prepare a prototype of it.
3. Co-create: expanding the prototype into a full product/service/solution.

Civic Design proposes to reach the expected solutions through processes or methods, enabling relationships and strategies based on the collaboration of many people located in their specific territories. Civic Design has the ambition of generating Civic Innovation. The results can be Services, Spaces, Relationships, Systems, Tools, Devices, Methods, Processes, Strategies, Policies, Audio-visual Content and Mobile Applications.²⁷

of cultural, artistic and social services in their territory. The mobilisation of these local actors can lead to the activation of forms of collective intelligence.²⁸

CULTURAL LEADERS TOOLBOX

Civic Design in 20 Points

"

1. Civic Design is about how we organise ourselves in common.
2. Civic Design promotes inclusivity, transparency, accessibility, and durability.
3. Civic Design promotes dynamics and processes that implicate different actors that act as prosumers, that is, alternating a more active role (producer) with a more passive one (consumer).
4. Civic Design promotes open data and open knowledge.
5. Civic Design promotes situated collective intelligence processes.
6. Civic Design promotes the processes coordinated by an open, diverse and in evolution team.
7. Civic Design takes the power of the glocal²⁹ dimension so that territories can benefit from the knowledge and experience produced globally without losing the perspective of local reality.
8. Civic Design generates projects based on transdisciplinarity and co-responsibility.
9. Civic Design contributes to the shaping of open and shared territories, collective learning spaces based on physical-digital hybridization and a culture of learning by doing.
10. Civic Design contributes to the hybridization of concepts, actors and realities, assuming that the reality is dynamic and hybrid.
11. Civic Design does not see technology as a simple tool but more as an essential actor of territory.
12. Civic Design promotes distributed processes and dynamics.
13. Civic Design promotes the creation and empowerment of extitutions and with it, extituent processes.
14. Civic Design promotes reflection on new professional ethics based on the transmission of knowledge and information. the civic designer in his usual position of mediator and facilitator must promote community empowerment and become prescindible for the future of the process.
15. Civic Design states for informed & critical society impregnated per resilient abilities and reaction capacities contributing to a sustainable society
16. Civic Design points the civic designer as an actor particularly sensitive and able to read, filter & manage territorial information able to stimulate relations and create opportunities affirming itself as a transverse connector and facilitator that works with the territory and not above it towards solutions based on processes of collective intelligence.
17. Civic Design defends the value of the human & creative capital promoting human & economic dignity.
18. Civic Design understands education as a key factor, considering that learning should not consist in a simple transfer of knowledge but in a creative and collective process, always situated.
19. Civic Design includes and promotes the interaction between the different generations and communities engaged in each territory.
20. Civic Design supports an alive memory around each project/process. "

Source: 'Civic Design by Civic Innovation School', by Maria Joao Pita and Domenico di Siena

Civic Space

A civic space is a space that promotes situated collective intelligence, facilitating the necessary resources, knowledge, tools and networks needed to promote projects of civic interest with impact on the territory. In this space, institutions, companies and citizens work together to build Civic Commons.³⁰

Civic Commons

Civic Commons is a term that refers to the facilities and shared spaces where a city's residents 'celebrate, learn, rest, play, make key decisions, express collective aspirations and provide for themselves and one another.' Commons being considered as to be goods, processes and resources - natural or cultural as well as material or immaterial - that people share with each other in their private and public spheres.

Civic Tools

Civic tools are digital or physical tools that contribute to develop collective intelligence processes or facilitate the engagement of citizens in the governance of territory. These tools multiply the dynamics of communication, in a verbal or non-verbal language, between people who don't know or aren't used to doing it.

CULTURAL LEADERS TOOLBOX

Civic Design Book is a compilation of projects, reflections and research. It offers a comprehensive presentation of the Civic Design methodology, based on the development of collaborative dynamics to generate collective solutions for the community wellbeing. It combines different disciplines, such as service design, urban planning, industrial design, architecture, policymaking, and many more.

Civic Innovation School is a collaborative learning environment focused on civic innovation, collective intelligence, open design and civic engagement.

CivicWise is an open network that promotes citizen engagement, developing concrete actions and projects based on collective intelligence, civic innovation and open design.

Civic Practices Book brings together 90 contributions from 16 countries and 40 cities and is Organised in four sections: spaces, actions or projects, methodologies and research. It presents inspiring spaces, projects, methodologies and researches that can be adapted to improve the level of leadership of cultural organisations.

Civic Design Methodology

Methodologies to implement Civic Design in one's own work can vary but the aim is to develop methods and processes enabling the collaboration of local citizens with each other and on their territory.

You could implement Civic Design through three ways of working, which are complementary and can be activated at different stages and according to the needs:

1. **Doing** or Circular Process can be used to lead a reflection focused on defining ten phases of a circular sequence in a simple and general way:
 - a) Beginning
 - b) Planning
 - c) Involvement
 - d) Purpose
 - e) Dissemination
 - f) Welcome
 - g) Launch
 - h) Prototyping
 - i) Implementation
 - j) Impact

These phases are meant to be used in an evolutionary way and can be started at any stage at which the process has been left.

2. **Thinking** or Collective Intelligence Canvas can be used to allow us to reflect on the people, resources, dynamics, strategies and the necessary relationships needed to activate Civic Design from a territorial perspective. The aim is to make these individuals and structures work together in order to make a positive impact on their environment. This can be applied through reflecting on the following ten components: working group; purpose; communities; communication; spaces; the duality of digital and physical spheres; time; prototyping; funding and governance.

3. **Positioning** or Civic Ream Ecosystem can be used to reflect on the activation of infrastructures, resources or commons capable of stimulating a civic sphere. The Civic Ream is the space between private and public spaces, a common space where the social, the market and the institutional stakeholders come together. Reflecting on these spaces aims to give tools to people to reactivate their environment and go beyond their usual practices.³¹

Civic Design, as a co-creation design approach that focuses on creating common services while empowering the communities, is different from 'Design Thinking' which is a problem solving approach/tool that is participatory in nature but can be applied in contexts that are not necessarily connected to civil efforts, for example in corporates and businesses.

Design Thinking

'Design Thinking is a design methodology that provides a solution-based approach to solving problems.'³²

'Active and effective leaders are the ones able to succeed with design thinking efforts. It is important that leaders engage with the team at the right time, **help** them deal with the stress that comes with the change, **encourage** the team to invest in exploring different solutions while **maintaining**

the confidence that their efforts are bringing them forward. Teams need enough time, space and clarity that they are engaged in a creative process and not mere implementers of top management decisions. Leaders should secure this to their teams. Design thinking is challenging because it involves not only managing the change but also, and most importantly, discovering what change is needed.'³³

'The five-stage process of design thinking'³⁴

1. **Empathize:** understanding of the problem you're trying to solve. Empathy is crucial to a human-centred design process such as design thinking because it allows you to set aside your own assumptions about the world and gain real insight into users and their needs.
2. **Define:** accumulating the information gathered during the Empathize stage, analysing observations and synthesising them to define the core problems identified; the problem statement.
3. **Ideate:** challenging the assumptions and creating ideas, looking for alternative ways to view the problem and identify innovative solutions to the problem statement created. Brainstorming is particularly useful here.
4. **Prototype:** Starting to create solutions. This is an experimental phase. The aim is to identify the best possible solution for each problem found.
5. **Test:** Evaluators rigorously test the prototypes. Although this is the final phase, design thinking is iterative: Teams often use the results to redefine one or more further problems'³⁵.

THE FRAMEWORK

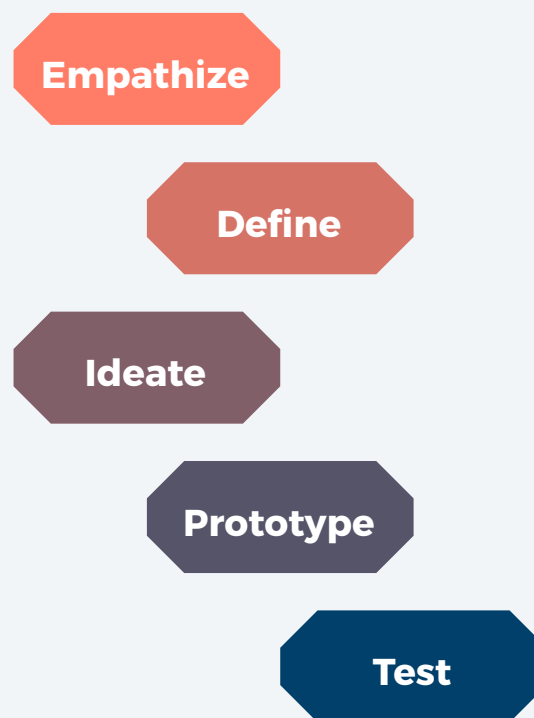


Image by the Stanford d.school

CULTURAL LEADERS TOOLBOX

Stanford's Institute of Design (d.school) Starter Kit

An excellent toolkit for the facilitators of design thinking processes in the format of an online curriculum.

Stanford's Institute of Design (d.school): Design-Thinking Bootleg

A deck of cards, each of them presents practical examples and heuristics useful for action and inspiration in design thinking processes, both at individual and collective level. Each card of the Bootleg is relevant for one or more of the five components of design thinking: empathize, define, ideate, prototype, test.

Designscapes Toolbox

A design approach helps cultural leaders identify, frame and address problems. This toolbox is a collection of methods and tools that can be applied to various innovation processes. It collects 15 methods and tools for design processes of innovation in teams and organisations, describing their content, their relevance, innovativeness, presenting examples of application and additional resources. It guides the readers in the selection of the most fitting instrument for the goals of their design processes. It is human-centred and participatory, it is iterative, it fuels convergent and divergent thinking. Finally, this toolbox has a suggestive and educational approach, focused on urban issues, and explores the effectiveness of design approaches.

Competendo - The Digital Toolbox

An open source toolbox for facilitators active in civic initiatives, divided in four parts: Understanding (Theory about empowerment, competency based learning and facilitation); Before (Planning goals, content, methods. Organising seminars. The facilitation mindset); During (Concrete training techniques and methods from different fields of education); After (Evaluation and documentation of learning processes. Identification and description of learning outcomes).

3

PARTICIPATORY GOVERNANCE

What is Participation?

Definition of participation is still subject to debate. Few definitions are:

- 'Participation is often understood only as the engagement of citizens in collaborative and direct decision-making processes and governance structures'³⁶.
- Participation is the right to have "equal power to determine the outcome of decisions."³⁷

One of the targets of the Sustainable Development Goal (SDG) number 16 is target number 16.7: 'ensure responsive, inclusive, participatory and representative decision-making at all levels'³⁸ which stresses the importance of participatory governance in decision-making processes.

Forms of participation in cultural organisations:³⁹

- Attention: attending and paying attention to cultural activities together with others.
- Education: taking part in learning activities.
- Co-creation: making specific objects, events or processes together.
- Cohabitation: sharing spaces together with other citizens or cultural agencies.
- Publics: engaging in collective interaction and deliberation.
- Co-decision: engaging in equal and shared decision-making.

Effects of participation in cultural organisations:

- Aesthetic intensity: sensory stimulation of the body, feeling affected.
- Feeling of togetherness: emotional and cognitive sense of bond to various others.
- Social inclusion: moving persons/groups from a marginalised to an included position.
- Wellbeing: physical/mental positivity/vitality (e.g. having fun or feeling that you do something for others).
- Learning: achieving certain skills or competences (e.g., learning to perform or to collaborate with others).
- Empowerment: feeling of (shared) agency regarding certain self-defined goals.
- Cultural/political reflection: stimulating critical analysis of society and thinking about or experimenting with possible alternatives (e.g. sharing economies).
- Local development: changing the centre and/or surrounding environment (neighbourhood, city, region) for the better.
- Sustainability: stimulating positive green/environmental changes (e.g., through repair cafes or recycling initiatives).

What is Governance?

'All processes of governing, whether undertaken by a government, market, or network; whether over a family, tribe, corporation, or territory; and whether by laws, norms, power, or language'.⁴⁰

What is Participatory Governance?

'Participatory governance refers to a specific type of governance relationship; this type of governance is generally grounded in theories of **participatory democracy**, based on the engagement of **citizens** in collaborative **decision-making processes**'.⁴¹

Participatory governance is a set of mechanisms intended to involve a group of people (e.g., citizens, members of an organisation, etc.) in **policy-making processes**. It aims at strengthening bridges between institutions and people with the objective of having **more efficient policies**.

It does so by letting people participate in the elaboration of policies that affect their lives. Many European cultural networks are built on this principle.

Participatory governance focuses on deepening democratic engagement through the participation of citizens in the processes of governance within the state or local community. The idea is that citizens and stakeholders of an organisation should play more direct roles in public decision-making.

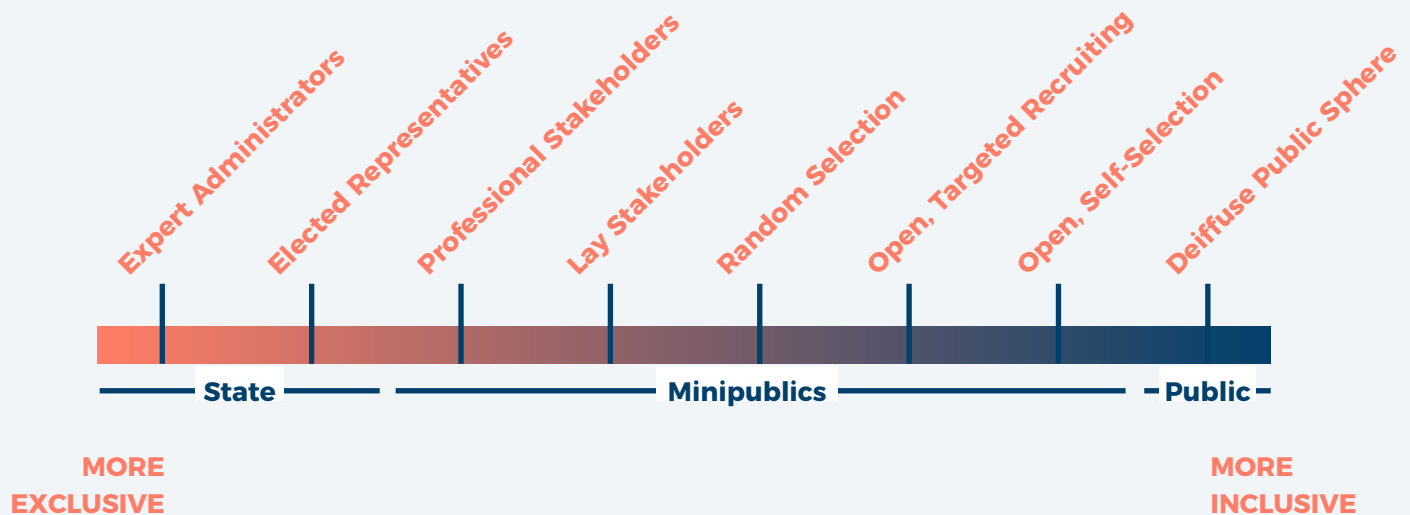
The Benefits of Participatory Governance

Participatory governance and its integration in institutions is crucial because:

1. 'Participation can improve the level of legitimacy of institutions.
2. It improves the level of justice in decision-making, giving actors whose voices have not been heard before the opportunity to express their concerns.
3. It improves the effectiveness of administration.¹⁴²

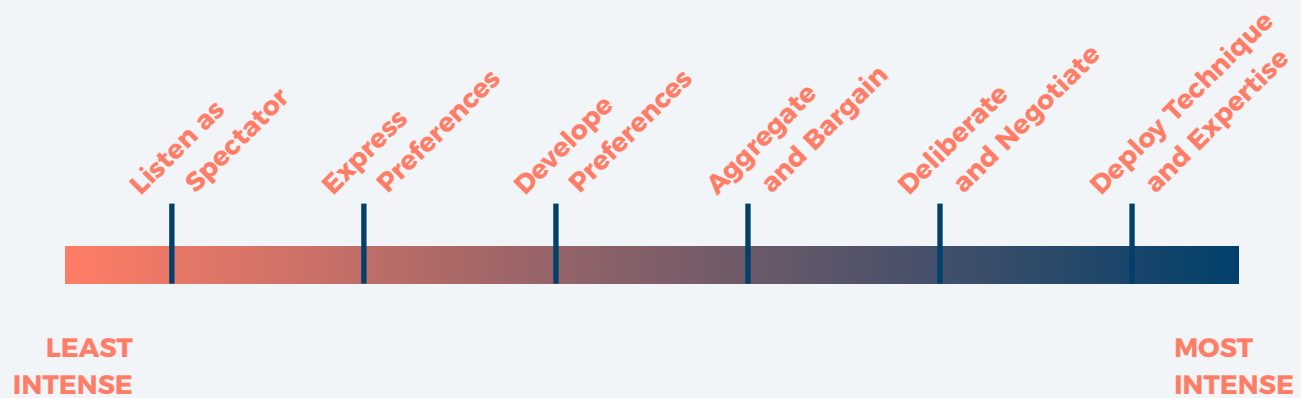
Participatory Decision-making Processes⁴³

1. Since participatory governance means that citizens should play more direct roles in public decision-making, it is important to look closely at the participatory decision-making processes.



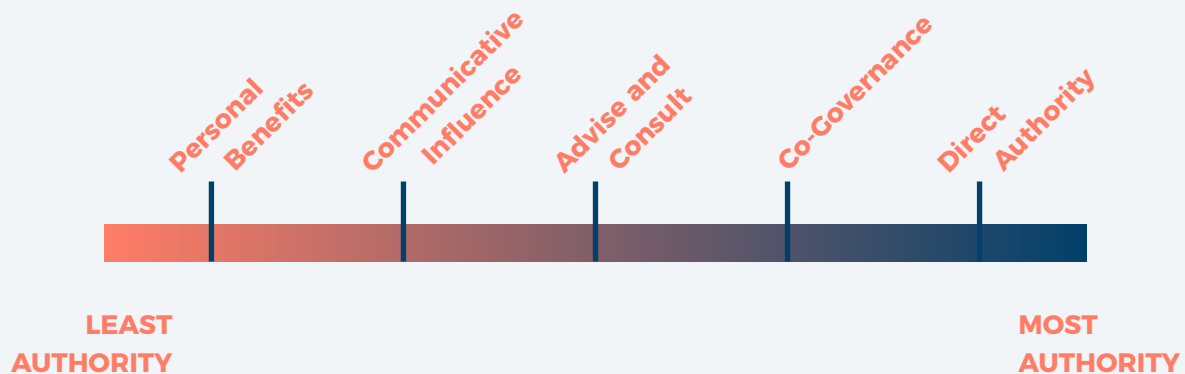
1. Participant Selection Methods: This dimension represents the most important aspect of participation: **who participates?** This question makes us reflect on **the selection of participants**, their origins, their perspectives, their representativeness and the skills they are able to mobilise. We should therefore question who is eligible to participate and how individuals become participants.

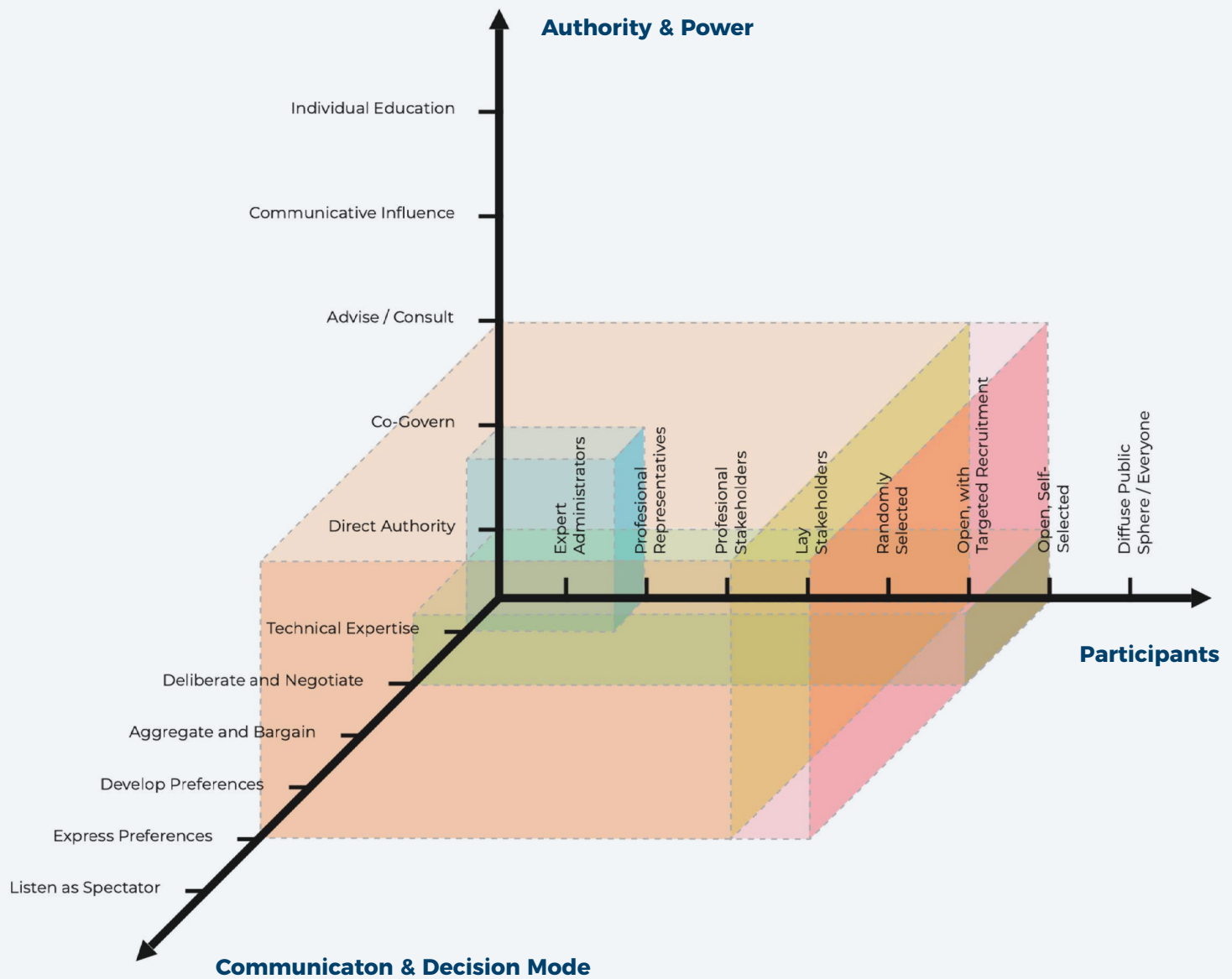
2. Modes of Communication and Decision: Participation rarely develops through ideal communication conditions, where participants interact as equals. In practice, the intensity of modes of communication and decision-making ranges widely with different levels of investment, knowledge and commitment required of participants. In the less intense side of communication and decision making, we can find situations where the engagement is based on **passive attendance** (for example: **listening as spectators**). On the **more intense levels** of participation the participants are guided in the **development of collective choices**.



3. Extent of Authority and Power: On the least level of authority, participants have no expectations to influence public action. Their engagement with the process has more of an impact on their personal civic duty than on the actual results. These situations focus on the transfer of information and elaboration of personal preferences. On the highest level of authority, the **devolution of direct power to participatory processes** is structured through two different geometries of authority:

co-government processes (where participants govern in partnership with officials and elected representatives as equally powerful but separate governing bodies, mixing representative democracy and participatory democracy) or **direct authority** (where participatory bodies are the repositories of **direct authority** over public decisions: representatives and administrations are required to follow their decisions).





ANALYSIS OF THE ESPACE IMAGINAIRE THROUGH THE DEMOCRACY CUBE.

Elaboration of Francesco Campagnari from Fung (2006) Analysis of the Espace Imaginaire through the Democracy Cube.

Elaboration of the author from Fung (2006)

In red, the cube representing the formal participatory processes; in yellow, the cube of informal interactions; in green, the co-management and co-construction processes; in blue, the involvement of external organisations and public administrations.

Read the full [paper](#) including the **case study of Espace Imaginaire**, an urban intervention project developed since 2016 by the cultural centre Mains d'oeuvres in Paris.⁴⁴

Values of Participatory Governance

1. **Civic-public partnership** – partnership represents the highest form of participation in decision-making and implies sharing responsibilities at every step of the political decision-making process.
2. **Good governance** – implies responsibility, transparency and inclusiveness in effective resource management for sustainable community development.
3. **Community building** – based on co-production, collaboration and networking among stakeholders in the community, it is of crucial importance for civil society, democracy and civic engagement within local community development initiatives.
4. **Influence/social impact** – participatory governance gives an opportunity for influence by decision making and participation in strategic planning and policy making.
5. **Trust building** – this basic value and core of Social Capital is necessary to build successful communities. It is an essential component for any partnership. Also, entering into partnerships develops trust.

Who is Participatory Governance For?

Participatory governance is for citizens that wish to play a more active decision-making role in society. Yet, it is also desired and demanded for all other stakeholders of a particular project or policy in societies which title themselves as democratic. Local, regional or national governments, NGOs, companies, institutions, development agencies, community centres etc. can benefit from active engagement in decision-making processes and the diverse perspectives of their community members.

Participatory Governance Application Areas

- Participatory governance of public spaces, such as cultural heritage and other types of public spaces.
- Participatory governance of community driven planning and development.
- Participatory budgeting.
- Participation in policymaking and strategising.

Implementing participatory processes in the governance of organisations is seen to be a great asset to increase legitimacy and reinforce the representation of diverse groups in organisations and share power with different stakeholders. However, there are a few issues and challenges which need to be taken into account when developing a participatory approach in the governance of cultural organisations.

Participatory Governance Challenges/Issues

- **Expectations:**

- » There are no one-size-fits-all and no cure-all solutions⁴⁵. The participatory processes will depend on the aims, the focus and the development of what is being implemented.
- » Managing the different expectations and interests of the various stakeholders will be key to accompany the different decisional processes⁴⁶.
- » An increase of participation in the governance may influence the priorities and operational environment of professional staff⁴⁷. The change of focus in the organisation might not correlate with the working practices in the organisation and their expectations and work will have to be handled very carefully.

- **Representation:**

- » The question of who participates will be crucial in the implementation of participatory processes. How is the selection of participants being done, what is their origin, their skills, how do individuals become participants and what is the degree of participation wanted?⁴⁸
- » Participation can be instrumentalised and can be used as a new “political technology” to control processes and projects and be used to keep the power to the same stakeholders⁴⁹.
- » Participation will be difficult to achieve in inequitable social contexts⁵⁰ as studies show that people with less income and power will have the tendency to less participate without being explicitly targeted.
- » Participation from underrepresented communities might be captured and manipulated by elites providing funds or platforms⁵¹ or by colonial and patriarchal powers.
- » People with interests and time in the project/organisation will be more inclined to participate and use it as a means for their own interests⁵².
- » Interest in the organisation and its aims and objectives might be difficult to raise and it can also be challenging to give a sense of ownership to the organisation from the participants.

- **Methodological Limitations:**

- » Lack of financial, time and human resources⁵³ for stakeholders to be ready to include participation in all the steps of decision-making.
- » Lack of (access to) information and transparency as well as difference in languages (formal, informal...) and know-how might exclude some stakeholders and bias the participatory process.⁵⁴
- » Digital technology should not be considered as ‘IT-based interactivity’ with various stakeholders⁵⁵ but more as an enabler to achieve further participation.
- » The challenge of lack of participation might only be related/caused by the design of our institutions instead of the object of the projects/organisations⁵⁶.
- » Participation could transform into strategic bargaining ‘if I get this, you will have that’.⁵⁷
- » A solely top-down approach should be avoided. If the relation with the community and various stakeholders is not prepared and no dialogue has been foreseen before the start of the participatory process, the community might take little interest in what will happen.⁵⁸
- » A solely bottom-up approach should also be avoided as the initiative might not be supported by the decision-makers as well as no long-term and/or strategic thinking might not be embedded in the participatory process.⁵⁹
- » Certain skills and knowledge may be needed to participate, general and/or specific on the organisation, legal framework, background, community.⁶⁰

- **Environment:**

- » The constant shifts in our environments, governance institutions and structures need to be constantly assessed and adapted to the participatory processes.⁶¹
- » Citizens may be reluctant to take action and make sacrifices of time and energy unless they are confident that their consultation and opinions will be translated into action.⁶²

Solutions

- It will be crucial to stay open-minded and give more importance to the process itself which in the end might provide more input.⁶³
- Best practices examples show that it will be key to combine the bottom-up and top-down approaches to have them interact with each other⁶⁴. Top and bottom must work together⁶⁵.
- All stakeholders involved might not need to be equally involved and they might be able to complement each other with their different knowledge and skills.⁶⁶
- To be prepared for these challenges, it will be needed to plan accordingly for organisational resources to be allocated to train and accompany the different stakeholders in the participatory decisional processes.⁶⁷
- There will be a need for education, training and continuous professional development⁶⁸ as professionals who are not trained to facilitate participation might lack will and understanding of going through a different way of engaging with citizens.⁶⁹
- It will be crucial to prepare the participatory process beforehand by identifying stakeholders; developing a common vision; allocating resources; and by providing an environment where knowledge can be shared and participants can learn from each other.⁷⁰
- By providing transparent and sufficient information on the aims, evolution and stakeholders, the participatory process should ensure success and foster trust.⁷¹
- Trust, mutual respect and interest in the other will be important conditions in the process.⁷² Leaders by becoming facilitators could provide space for participatory processes, this is also reflected in the public's shift from "users and choosers to makers and shapers"⁷³ and the do-it-yourself trend.

Best Practices

1. Espace Imaginaire, Saint-Denis France (Campagnari 2020):

The organisations Mains d'oeuvres and Interazioni Urbane developed their project of urban intervention through 3 steps:

- » Process of local diagnosis by detailing the needs, resources and actors present in the neighbourhood through public hearings and contacting residents and users of the neighbourhood directly.
- » Identified with the information gathered, the poles of activity of the centre.
- » Put into place their action of co-designing, co-constructing and co-managing: the assembly of co-managers (self-declared) is the higher authority of the organisation, they use it by inquiring the status of the projects at the different stakeholders involved, there is an administrative office, which manages day-to-day operations, and the involvement of external organisations and public administration is there to provide technical expertise and formulate regulations and policies.

2. Practices of public budgeting in Porto Alegre, Brasil (Fischer 2012):

A left coalition in 1989 introduced a “publicly accountable, bottom-up system of budgetary deliberations”. Different stakeholders: city administrators, representatives of community groups and interested citizens come together to decide according to information gathered from the previous years what should be the spending priorities for the future. After deliberations the council will submit the budget to the mayor and then it might go back to the council until it fits both decision-making bodies.

3. Cultural policy from Amsterdam to Žilina:

The region of Žilina is the first case where the policies for culture programme principle of civic participation in the development of local cultural policy was tested in the context of the enlarged European Union. The project was aiming at initiating a comprehensive process related to the development and implementation of the principles of strategic planning in cultural policy making so as to provide the citizens of the region of Žilina, Slovakia with diversity, quality and availability of cultural activities. This programme aimed at the development of cultural policies with local administrations.

How to Include Participatory Processes into Cultural Organisations?

Participatory processes have proved to be highly beneficial in most of the study cases but there are no one-size-fits-all and cure-all solutions. A few questions can be asked as to what could be adapted to the cultural sector? Are participatory processes needed? What are the processes that are already working or not and why? How to make stakeholders more involved, why and which ones?

These are examples of questions that one will need to answer before getting started with these processes. As there are very few best practices for cultural organisations and networks, the wish to experiment and explore new ways of working will be needed to get started with implementing participatory processes.

Inspiration could also be taken from cultural networks, which already implement some form of participatory governance by giving to their members equal rights of speaking, organising and influencing the direction and governance of the network (board, working groups etc.), while members investing time, energy, and money in the network will not have the same knowledge on the sector and the network's activities, they will have the equal power to influence its governance. Cultural networks have also been lately looking at how to use digital tools to reinforce participatory processes, of which a few examples can be seen in [Appendix](#). By investing time in enabling all stakeholders/members to have the opportunity to express their views, networks and cultural organisations will ensure that the sector is strengthened and representative of its diversity.

4

DIGITAL TOOLS FOR
PARTICIPATORY GOVERNANCE

What is Digital Democracy?⁷⁴

Digital Democracy can be defined as 'The practice of democracy using digital tools and technologies'.

Other definitions:

- The use of digital tools to provide information and promote transparency;
- The ways in which information and communications technologies (ICTs) can broaden and deepen participation;
- Promoting empowerment by enabling citizens to make decisions directly through online tools.

Why Digital Democracy?

The gap between the way in which citizens go about their daily lives and the way in which politics and democracy are carried out is one of many factors that has contributed to declining trust and confidence in democratic institutions.

Large minorities in the US and Europe no longer see democracy as a good system of government, particularly young people. According to the Economist Intelligence Unit's Democracy Index in 2014 and 2015, not only are participation rates low, but the highest levels of disengagement have occurred in 16 out of the 20 countries classified as 'full democracies'. In response many have argued that digital technologies are the answer, and that they alone can encourage greater participation, better decisions, and more trust.

Claims are that **digital democracy** can achieve **deeper and broader participation**, that it can contribute to a **richer public sphere for argument and debate** than was ever possible with traditional mass media; and that tapping into more individual sources of expertise can achieve **better decisions** by having **more eyes** on a document or process, or by bringing in people with a **greater diversity** of experiences and expertise to provide input or scrutiny. Decisions are improved by **increasing the pool of ideas accessed or suggestions made**.

Participatory governance in projects of networks/organisations/governmental bodies is significantly improved by the use of digital tools since they enable participants to get engaged and lower the barriers to their participation. Participatory governance digital tools may provide:

- Information on the internet;
- The chance for the public to get into an online consultations process;
- The chance for the public to participate in decision processes.

Selecting a Tool

When selecting a digital democracy tool, take this into consideration:

- The tool should have a friendly user interface;⁷⁵
- The tool should have low barriers for the first-time users, including cost and technical skills;⁷⁶
- The tool should offer interaction and networking functions;
- The tool should offer a strong data analysis engine to benefit from the events' statistics.

What Makes a Good Digital Democracy Process?

A clear plan and process:

- Think twice: don't engage for engagement's sake;
- Be honest: what's involved and what are you going to do with the input?
- Digital isn't the only answer: traditional outreach and engagement still matter.

Support:

- Don't waste time: get support from decision-makers before you invest too much;
- Don't cut corners: digital democracy is not a quick or cheap fix.

The right tools:

- It's not about you: choose tools designed for the users you want, and try to design out destructive participation.

Which Digital Democracy Tool?

[Appendix - Digital Tools For Participatory Governance](#) includes a list of online tools for different purposes, including:

- Complex conference tools for online and hybrid conferences
- Tools allowing more flexible online networking activities
- Easy tools for online meetings and General Assemblies
- Online voting and elections
- Tools for group scheduling / fixing dates, brainstorming & cooperation
- Tools for online training
- Presentation tools
- Tools for online cultural activities

CULTURAL LEADERS TOOLBOX

An overview of how digital tools can create meaningfully participative and collaborative environments.

Digital Democracy concepts, case studies, processes quality, and the impact and the future evolutions of digital democracy.

Reference: Rumbul, R. (2019). The State of Digital Public Engagement. [online] mySociety Research. Available at: <https://research.mysociety.org/publications/state-digital-public-engagement> [Accessed 10 Sep 2021].

Digital Inclusion

'Digital inclusion refers to the activities necessary to ensure that all individuals and communities, including the most disadvantaged, have access to and use of Information and Communication Technologies (ICTs).'⁷⁷

While the spread of the internet and digital tools has provided the opportunity for people to connect with each other and access information regardless of distance, it is also critical to be aware of the ways in which digital tools can exacerbate existing inequalities.

The 'digital divide', which originally referred to the gap between people with access to the internet and people without access to the internet, has now evolved into a broader concept.

People may face digital exclusion for a number of reasons, including:

- Limited internet infrastructure
- Limited robustness of internet service
- Affordability of internet-enabled devices and internet services
- Access to assistive devices
- Access to technical support
- Safety (online abuse, aggression and violence)
- Artificial Intelligence bias and discrimination

Access to Digital Literacy Training

- Content accessibility
- Language barriers

What Can Cultural Organisations Do to Be More Digitally Inclusive

- **Assess Accessibility:** Investigate the digital tool's accessibility features. Does it work with assistive technology (e.g., screen readers)? Does its interface use colours with a good contrast ratio for people with visual impairments? Is it easy to undo mistakes? Can it be navigated by keyboard or does it demand the use of a mouse?
- **Detect barriers:** Announce the intention to use the tool in advance and ask to be made aware of any concerns or accessibility requirements from users.
- **Promote literacy:** Provide guides in different formats (e.g., video with subtitles, text) on how you will use the digital tool. Keep the information brief and clear; do not include superfluous information that does not relate specifically to how you will use the tool.
- **Offer technical support:** Provide opportunities for users to test the digital tool with you in advance of its use; have a dedicated person to support with any troubleshooting on the day.
- **Facilitate alternative access:** Provide alternatives to use of the digital tool if it cannot be used by all users.

For more information on inclusion in the digital environment, you may also wish to consult the SHIFT Inclusion Handbook⁷⁸, particularly on the topics of Communications (Chapter 4) and Events (Chapter 5).



5

ORGANISATIONAL CHANGE AND EVOLUTION

This chapter and the following two chapters focus on the internal organisational aspects of cultural leadership. Leaders guide cultural organisations, and need therefore to understand how organisations can change and evolve.

‘If you are leading any type of implementation effort that requires people to change, you should think carefully about how you are addressing employee and stakeholder participation as part of your change approach.

Participation is a conscious and intended effort by individuals at a higher level in an organisation to provide visible extra role or role-expanding opportunities for individuals or groups at a lower level in the organisation to have a greater voice in one or more areas of organisational performance. The higher level and lower-level distinction will most likely be reflected by hierarchical level but can encompass any situation where one individual has legitimate power, authority, or control over another.’⁷⁹

Benefits of Participation

'14 studies on participation'⁸⁰ reflects that participation in change has a variety of positive effects on employees and is associated with increased support/reduced resistance to change:

- Positive emotions
- Sense of control
- Reduced stress
- Interpersonal trust
- Sense of competence
- Change readiness
- Increased acceptance.⁸¹

Barriers to Participation

- 'Structural factors: the organisational design, work design and policies that retain decision making at the management level.
- Relational barriers: is about hierarchy and status, also how participation is managed in the organisation.
- Societal barriers: including societal or organisational culture and values.⁸²

Leaders need to take time before an organisational change to assess systematically who might resist the change initiative and for what reasons.

Resistance to Change

Resistance to change is a natural human reaction. It happens because it requires leaving what we know to the unknown, moving from our comfort zone to something unfamiliar, which makes it hard to set our expectations.

Introducing a change to the organisation, leaders should not only manage the resistance to the change but expect it and be proactive about it; either by mitigating the causes of the resistance and/or by mitigating the consequences of the resistance.

Why Resistance Occurs

'Change creates anxiety and fear. The current state has tremendous holding power, and the uncertainty of success and fear of the unknown can block change and create resistance. These physical and emotional reactions are powerful enough by themselves to create resistance to change. But there is more to resistance than our emotional response. From a change management perspective, we must examine the other drivers that influence an employee's resistance to change:

- The impact on their work
- The credibility of people communicating the change
- Personal factors, including finances, age, health, mobility and family status
- The change's alignment with their value system
- The organisation's history of handling change

Even when impacted people and groups can align the change with their self-interests and belief systems, the uncertainty of success and fear of the unknown remain significant barriers to change.⁸³

Common Causes for Resistance to Change⁸⁴

Identification and analysis of the root causes of resistance to change is the first step to managing it. According to John P. Kotter and Leonard A. Schlesinger, the root causes of resistance could be that individuals feel they will lose something of value, or because there is a lack of trust, or because the change and /or its consequences are not well

understood. Often the resistance stems from the fact that individuals aren't aware of the need for change, or the fear of not having or being able to develop the skills or knowledge needed after the change happens. Peer group pressure can also be a cause for resistance to organisational change.

Tips for Leaders:

- Due to their limited tolerance for change, people might resist the change even when they realise it is a good one.
- Individuals or groups can react very differently to change—from passively resisting it, to aggressively trying to undermine it, to sincerely embracing it.
- Many leaders underestimate the variety of reactions to change and their power to influence those responses.
- [Stakeholder analysis techniques](#) are good tools for leaders to assess who might resist the change and why.
- Understanding the real reasons for resistance enables leaders to select the appropriate strategy to overcome resistance.

CULTURAL LEADERS TOOLBOX

Humble Leadership

The father of organisational culture studies, Edgar Schein introduces the concept of Humble Leadership in this interview and talks about organisational culture, when is culture particularly important for the organisation, what does changing an organisational culture really mean, and leadership role in encouraging innovation culture in their organisations. This interview with Edgar and Peter Schein elaborates on the Humble Leadership Model.

Bajer, Aga. "Ed Schein: Shaping Culture." www.listennotes.com, 2018,

|| Often employees are not opposed to a solution or a new way of doing work, but rather they resisted change because no one made a clear and compelling case as to why the change was needed. **||**

[The Prosci ADKAR® Model.](#)

ADKAR Model for Change Resistance Management⁸⁵

There are many models for managing the change and dealing with resistance. One of the appreciated change management models is ADKAR® which suggests a process for managing the change that minimises the change resistance.

ADKAR stands for: Awareness, Desire, Knowledge, Ability and Reinforcement.

1. **(A)wareness:** Raise awareness about the reason for change: Communicate from different angles the rationale for why the change is needed. Without a clear reason and rationale for the change, stakeholders will have a hard time getting involved.
2. **(D)esire:** Empower and engage: Motivate stakeholders to desire the change
 - » Stakeholders can best embrace change - even if it has negative consequences - when they feel listened to throughout the different phases of the change process.
 - » Make sure to regularly communicate and involve your stakeholders to increase the desire for change and to ensure a change resistance won't build up due to frustration.
3. **(K)nowledge:** Provide new knowledge and skills
 - » Stakeholders (especially employees) might need to acquire new in-depth knowledge or undergo new training in order for a change to take place.
 - » Don't just send people off to a course, but make sure you have the structure and tools in place for them to implement new ideas.
4. **(A)bility:** Identify and address barriers
 - » Ability is about how you can get things done.
 - » Try to understand what's hindering stakeholders from contributing to the change.
 - » Check if they feel limited by their own personal skills, or by time, or by structures in the organisation.
 - » Encourage people to believe in themselves and their abilities. While it's hard to discuss weaknesses in the workplace, make it clear that there should be no shame in asking for help.
5. **(R)einforcement:** Make change stick
 - » To ensure things don't go back to how they were before, sustain the change by communicating about the progress achieved, celebrate milestones, and share success stories.
 - » Continuously share messages and stories about the change.
 - » Communicate the work to be done and effectively involve and inspire people throughout the whole process.

Often, change in organisations is seen as the role of senior management. They are the ones that must identify the need for change, determine how that change will be brought about, and ensure that it happens.

A paradigm shift to the notion of organisational change happened when Frederic Laloux introduced the 'Teal'

organisations as the next generation of organisations. 'Thinking of Teal organizations as living systems helps to explain how change unfolds within them. Living systems have a capacity to sense change in the environment and adapt. They react creatively, in the moment. Teal organizations deal with change in a similar way.'⁸⁶

So What is A Teal (Evolutionary) Organisation?⁸⁷

In his famous book 'Reinventing Organizations', Frederic Laloux explains that every time humanity has shifted to a new stage of consciousness, it has also invented a radically more productive organisational model. Frederic Laloux coined the term 'teal organisations' in his book 'Reinventing Organizations' where he uses a model in which he describes different types of organisations in terms of colour.

Laloux defines a "teal" organisation as one where the management is based on worker autonomy and peer relationships. He contrasts this to "red", "amber", "orange", and "green" organisations which, according to Laloux' theory, are based on hierarchies, meritocracy, or consensus decisions.

'People are free to act on what they sense is needed. They are not restricted by static job descriptions, reporting lines and functional units. They can react to emerging events. Specific methods embedded in the organization allow space for people to listen to the organization's purpose and the change it may require. When everyone is free to sense the need for change, and to act on it, change is a given; it happens naturally, everywhere, all the time, mostly without great pain or effort.'⁸⁸

The Three Breakthroughs Of A Teal Organisation

'Today, in small but increasing numbers, leaders are growing into the next stage of consciousness'. They are mindful, taming the needs and impulses of their ego. They are suspicious of their own desires - to control their environment, to be successful, to look good, or even to accomplish good works. Rejecting fear, they listen to the wisdom of other, deeper parts of themselves. They develop an ethic of mutual trust and assumed abundance. They ground their decision making in an inner measure of integrity. They are ready for the next Organisational paradigm. **Its colour is teal.'**

The **three breakthroughs** of a teal organisation are:

1. **'Self-management:** teal organisations operate effectively, even at a large scale, with a system based on peer relationships. They set up structures and practices in which people have high autonomy in their domain, and are accountable for coordinating with others. Power and control are deeply embedded throughout the organisations, no longer tied to the specific positions of a few top leaders.

2. **Wholeness:** practices that invite people to reclaim their inner wholeness and bring all of who they are to work, instead of with a narrow 'professional self' / 'masculine resolve' etc. teal organisations create an environment wherein people feel free to fully express themselves, bringing unprecedented levels of energy, passion, and creativity to work.

3. **Evolutionary purpose:** organisations seen as having a life and a sense of direction of their own. Instead of trying to predict and control the future, members of the organisation are invited to listen in and understand what the organisation wants to become, what purpose it wants to serve.'⁸⁹

CULTURAL LEADERS TOOLBOX

'Reinventing Organizations, a Guide to Creating Organizations, Inspired by the next stage of human consciousness' is a book by Frederic Laloux, 2014. It is an essential reading for cultural leaders to understand the evolution of organisations. Watch Frederic Laloux's brilliant Presentation about reinventing Organisations or the short video summary (10 minutes).

Soulful Organisations

Watch Frederic Laloux's video on How to become a Soulful Organisations

As part of the Teal movement focused on self-management, Holacracy was founded by Brian Robertson as a **new management system for governing** and running organisations **without a typical management hierarchy**.

It is 'a method of **decentralized management and organisational governance**, which claims to distribute authority and decision-making through a holarchy of self-organising teams rather than being vested in a management hierarchy.'⁹⁰

Holacracy⁹¹

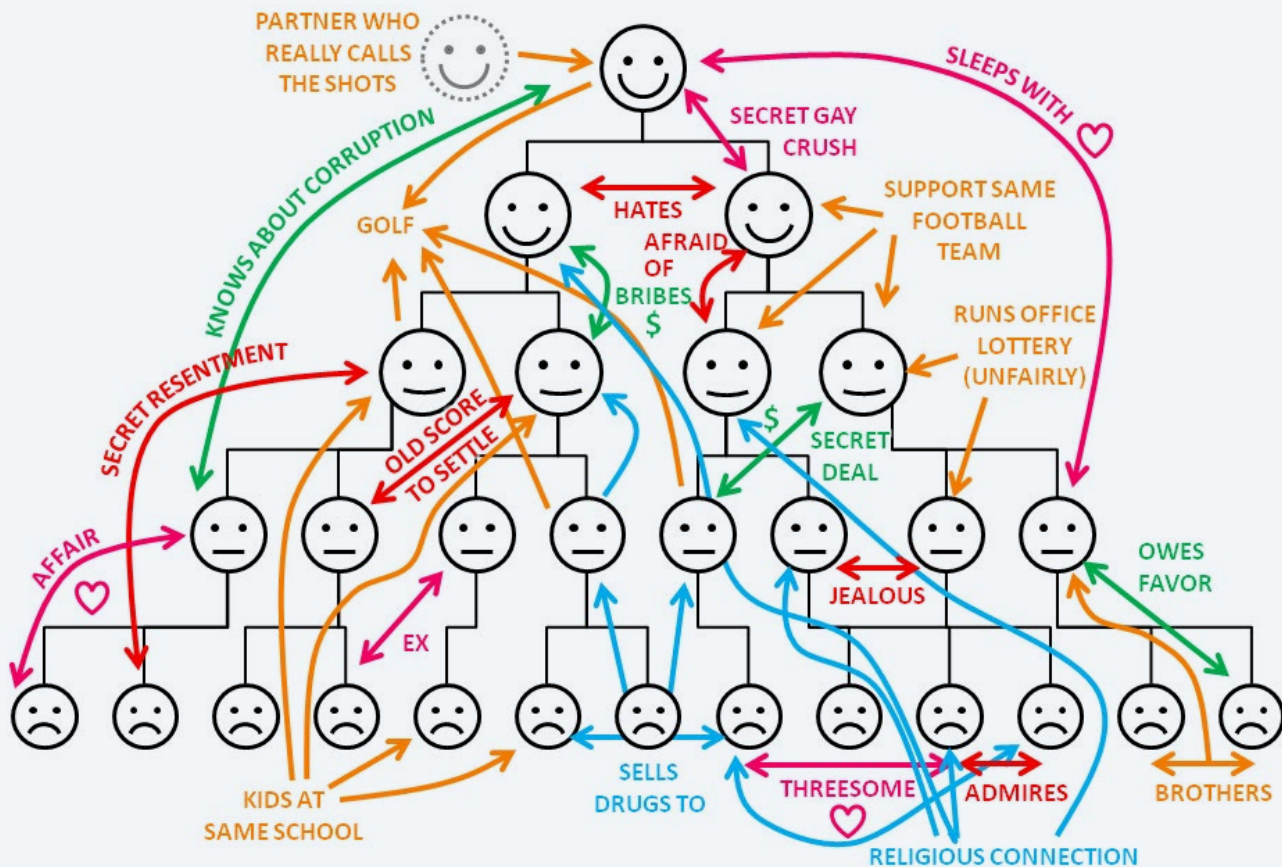


Image credits: Real Organisation Chart by Mark Walsh

So **holacracy is a participatory governance model** for organisations, based on shared authority, rules and autonomy, that fosters the ability of organisations to cope with complexity. Instead of operating top-down, power is distributed throughout the organisation; giving individuals and teams freedom while staying aligned to the organisation's purpose.

Holacracy-powered organisations focus on purpose at every level of scale: organisational purpose, team purpose, and individual purpose are all explicit and aligned. Every team member directs their energy in alignment with the broader mission.

CULTURAL LEADERS TOOLBOX

A book by the founder of Holacracy, Brian Robertson: 'Organization at the Leading Edge: Introducing Holacracy™' and a TEDxTalk : 'Holacracy: A radical new approach to management'.

Holacracy shifts some key aspects of organisational management: from static job descriptions to dynamic roles; from delegated authority to distributed authority; from large scale re-organisations to rapid governance interactions; from alignment via politics to transparent rules, set in a constitution.

'Self-Management is knowing exactly what you are responsible for, and having the freedom to meet those expectations however you think is best. **Self-Organisation** is being able to make changes to improve things - beyond what is required of you. Simple in theory, but everyone has to truly commit for it to work!

Holacracy helps organisations become **self-managed and self-organised** by giving every employee (instead of just management) the power to innovate, make changes, and have a voice.⁹²

|| *Historically, organisations have always been places where people showed up wearing a mask. People often feel they have to shut out part of who they are when they dress for work in the morning. They require us to show a masculine resolve, to display determination and strength, and to hide doubts and vulnerability. ||*

Frederic Laloux

Finding the sweet spot between giving your team the freedom and trust they need and ensuring there is still some degree of accountability for expectations is no easy task.

Below are 10 ways leaders limit success in a self-managed environment:⁹³

- Being a bottleneck
- Not effectively delegating
- Not holding people accountable
- Not giving constructive feedback
- Not leading by example
- Assuming others automatically know how to self-manage
- Not having the right people doing the right work
- Not effectively monitoring the team's health
- Not fully utilising transparent systems
- Creating environments of fear and anxiety

6

ORGANISATIONAL LEARNING

This chapter is about learning organisations and organisational learning. A learning organisation is one that is able to cope with shifts and changes in its context. Organisational learning⁹⁴ is a process that enables organisations to transform individual knowledge into organisational knowledge. Organisational learning is crucial to keep the organisation effective and responsive.

There are different approaches to organisational learning:

- People-based approaches to organisational learning
- Processes-based approaches to organisational learning
- Technology-based approaches to organisational learning

Characteristics of a Learning Organisation⁹⁵

1. **Openness:** Learning organisations are characterised by knowledge sharing and absence of silos among people. They are open to making and admitting mistakes and focusing on finding solutions.
2. **Lessons learned:** Learning organisations use self-assessment, 360° assessments, and project's lessons learned as part of the process and tools to learn from previous mistakes and successes.
3. **Personal mastery:** Learning organisations develop a culture that appreciates the personal drive to excel and master. Sharing with others their skills, employees innovate and create positive change.
4. **Elaborative learning:** Learning organisations build prototypes of the product and put them in interaction with stakeholders as soon as possible, to receive early feedback, learn how to produce a better version of the product and implement. The fact that it is still a prototype encourages honest feedback to improve while making the full product.
5. **Learn from others:** Learning organisations learn from others and from best practices.
6. **Clear vision:** learning organisations cultivate a clear vision with clear goals, where employees understand the significance of their roles and develop systems thinking, while creating their own benchmarks of success.

The Three Building Blocks of a Learning organisation⁹⁶

BUILDING BLOCK	DISTINGUISHING CHARACTERISTICS
A supportive learning environment	<p>Employees:</p> <ul style="list-style-type: none"> • Feel safe disagreeing with others, asking naive questions, owning up to mistakes, and presenting minority viewpoints • Recognise the value of opposing ideas • Take risks and explore the unknown • Take time to review organisational processes
Concrete learning processes	<p>A team or company has formal processes for:</p> <ul style="list-style-type: none"> • Generating, collecting, interpreting, and disseminating information • Experimenting with new offerings • Gathering intelligence on competitors, customers, and technological trends • Identifying and solving problems • Developing employees' skills
Leadership that reinforces learning	<p>The organisation's leaders:</p> <ul style="list-style-type: none"> • Demonstrate willingness to entertain alternative viewpoints • Signal the importance of spending time on problem identification, knowledge transfer, and reflection • Engage in active questioning and listening

The Five Building Blocks of Organisational Learning⁹⁷

- 1. Systematic problem solving:** Decisions are based on scientific methods to diagnose problems. Accuracy and precision are critical.
- 2. Experimentation:** Experimentation with new approaches includes the systematic search for and systematic testing of new knowledge. This activity comprises both one-time (e.g., demonstration projects) and continuous (e.g., research and development) experiments.
- 3. Learning from past experience:** Learning from individual experience and history requires constant reflection upon successes and failures to provide implications applicable to all individuals. Learning should result from careful planning (e.g., post-mortem evaluations) rather than chance.
- 4. Learning from others:** Learning from the experiences and best practices of others comprises benchmarking with clients or other external organisations to develop new ideas. Managers need to be open to criticism and new ideas.
- 5. Transferring knowledge:** Transferring knowledge quickly and efficiently throughout the organisation through written or oral reports, personnel rotations, or training.

Growing Through Change: A 'How-to' for Leaders of Learning Organisations

In this [TEDx presentation](#),⁹⁸ Yves Givel suggests a way forward for organisations to face uncertain and complex worlds, making the argument for a shift towards learning organisations through mindfulness practices.

Skill set or Mindset? Interesting question! Learning organisations are characterised by strong leadership, flat organisational structures and by a drive to bring more flexible and innovative work practices in the workplace. However, in order to make these organisations thrive, leaders have to adapt, changing their mindsets more than their skillsets: but

how can they create an environment where colleagues can try out new things, speak up and challenge the status quo?

Leaders' mindsets have to include: empathy, being able to listen to others and feel with them; supporting a culture of experimentation; welcoming safe failure; prototyping and developing processes of early failure. In order to foster these mindsets, Yves Givel suggests simple mindfulness practices for leaders to implement in their life and in their workspace.⁹⁹

CULTURAL LEADERS TOOLBOX

Is Yours a Learning Organisation? is a tool kit that can be used as an assessment tool by organisations to pinpoint areas where they need to foster knowledge sharing, idea development, learning from mistakes and holistic thinking.

Sensemaking

Sensemaking is turning certain conditions into something comprehensible that helps in taking action. A greater understanding of sensemaking is crucial for cultural organisations and their leaders, because 'Organisation is an attempt to order the intrinsic flux of human action, to channel it toward certain ends, to give it a particular shape, through generalizing and institutionalizing particular

meanings and rules'. Through examples of processes of sensemaking, cultural leaders will have a better understanding of how they can analyse and improve the engagement of their organisations with ambiguities.

This [article](#)¹⁰⁰ offers a theoretical insight into the role of the process of sensemaking in organisations.

Organise for Complexity

Managers, professionals and change agents in cultural organisations, like in many other profit or non-profit organisations, are today dealing with increasing environmental complexity. In this [presentation](#)¹⁰¹, the author argues that in order to address these issues, these organisations should develop towards forms robust for complexity, as well as fit for human beings. You will learn about concepts that allow

you to design entire organisations for complexity, regardless of size, age, industry, country or culture. In particular, the presentation introduces organisational models based on team-based organisations, networked organisations, as well as core organisational design principles and system-thinking approaches.

7

EVALUATION AND IMPACT ASSESSMENT

Cultural organisations are no strangers to evaluation. Every funding body demands evaluation of actions performed as a means to prove that the financing was given to the right people to achieve the right kind of impact and that this was done to an adequate extent. In other words, these evaluations are often designed in terms of the accountability of the funding body.

Defining its own framework of evaluation empowers the organisation to take into account all of the factors relevant in the organisation's environment, be it economic, social, cultural, or others. This enables the organisation to define the evaluation timeframe, what is to be evaluated, and what shall be taken into consideration in order to measure forms of impacts and overall the legacy of the organisation's project(s) to be evaluated.

Fundamentally, an evaluation should lead to the **identification of opportunities** to benefit in some way. This may be:

- Internal: discovering ways to improve operational processes.
- External: pinpointing strong justifications for future partnerships and when possible, funding or inspiring elements to use in marketing and communications.

This chapter will lead you through different approaches to evaluation, with a focus on participatory evaluation, its advantages and disadvantages. It also addresses different possible applications and guides you through evaluating societal impact. The ideas and models in this chapter aim to provide you with a foundational basis that you can take up and tailor to the reality of your own sector and organisation, while conceiving your own evaluation framework and putting into the forefront a greater diversity of data and stories of changes.

Why Is It Important to Evaluate the Governance of an Organisation?

- To **legitimate** the organisation's decisions and be accountable to the members of the community, partners and other stakeholders;
- To **improve** the quality of the work;
- To **identify** (and possibly update) out-of-date procedures;
- To **cope** with unexpected crisis and changes;
- To keep on track so as to **achieve** the goals of the organisation.

Poor governance constraints development. Be it of a nation, a community or an organisation.

Poor governance can be diagnosed by a number of factors:

- Internal conflicts or between managers and boards;
- High turnover of staff;
- Poor performance;
- Complaints by members of the community;
- Confusion about roles and responsibilities;
- Bad management of resources.

Evaluating the governance should show what's working and what needs to be reviewed.

Its objective is to make a decision or judgement: is everything working well? Should any processes be changed/adjusted?

CULTURAL LEADERS TOOLBOX

'The Evaluation Journey' is a toolkit that embarks on the different steps of development of evaluation through information, advice and exercises.

Link [here](#)

The most important to consider when evaluating the governance of an organisation is **to assess its effectiveness, efficiency, accountability, legitimacy and sustainability**.

As a start, a check-up to identify major areas of governance where there might be some problems or gaps would allow you to set priorities and start working on them. The evaluation can be conducted internally, be participatory or assigned to an external consultant (or a mix of the three) and can be carried out in various forms such as interviews, surveys, group discussions and data analysis.

Participatory Research and Evaluation

What are participatory approaches to research and evaluation?

They are inclusive methods that each organisation has to use to bring the community members or community-based organisations who are most affected by inquiries, in the design and execution of the process of their work. These processes reflect the perspectives, priorities, or concerns of those who are being studied.

To make the approach more inclusive and to reach a bigger variety of people, you have to include your network in the organisational process.

1. The first step of the process is '**Participatory research**', which is basically **a study** that is conducted by professional researchers who involve or collaborate with the individuals and groups that would have traditionally been considered the "subjects" of a study. The **research participants are having an active role** in producing new knowledge about their community.

2. The second step is '**Participatory action research**', which should be used to **shape** the design of a new initiative, **inform the execution** of an organisation's campaign, **provide evidence** supporting a particular political position, or **increase understanding** of a local issue.
3. The last step is '**Participatory evaluation**' which is important to **assess the impact** of a programme, process, or plan **either during or after** its implementation.

All these steps study past and current events to directly inform and influence future events.

CULTURAL LEADERS TOOLBOX

Observe the difference!

Participatory evaluation is typically studying the implementation and impact of a specific programme or process that has already been developed,

Participatory action research typically investigates larger community issues or problems to inform the development of a new or emerging program or process.

Participatory Action Research and Evaluation

Advantages and Disadvantages of Different Types of Evaluations¹⁰²

	ADVANTAGES	DISADVANTAGES
INTERNAL EVALUATION Initiative staff act as evaluators as either a portion or the entirety of their job.	Can be less costly than an external evaluator	Often have less access to specialized knowledge about evaluation methods and techniques than professional evaluators
	Usually have a rich understanding of the initiative's context, practices, and potential key evaluation questions; easy access to data	Sometimes seen by funders and other stakeholders as less credible than external evaluations due to having a stake in a positive view and possible greater reluctance of participants to share criticism
EXTERNAL EVALUATION Conducted by professional evaluators, usually hired by programs/initiatives or by funders	Traditionally viewed as impartial and better positioned to report objectively on program strengths and weaknesses and to what extent goals are achieved	Do not always have a nuanced understanding of the cultural, social, and political context that would lead to more-relevant evaluation questions and increase the chances of findings being useful to the program and community
	Can employ sophisticated data collection and analysis methods that fall outside the capacity of most program stakeholders	Power differentials, especially with participants from marginalized communities, can impede open and honest dialogue, leading to misleading or incomplete data
	Evaluation is often situated within the larger base of relevant research <ul style="list-style-type: none"> • Can compare program outcomes and impacts to other programs or models • Can address larger questions of interest to the field 	
PARTICIPATORY APPROACHES Staff and leaders play central roles in designing and carrying out evaluation, with or without the help of a professional evaluator.	Can strengthen evaluation design and increase impact by requiring deliberate collaboration with other stakeholders <ul style="list-style-type: none"> • Capitalizes on participants' nuanced understanding of cultural, social, and political context, often inaccessible to external evaluators • Evaluation questions more likely to address most urgent and relevant issues • Findings more likely to be used to refine program practices and strategy 	Requires major investment of time and attention by program staff, participants, and other stakeholders <ul style="list-style-type: none"> • Can be a burden for organizations with small staff and limited budgets, and for participants with many other obligations and pressures
	Can produce better and more thorough data <ul style="list-style-type: none"> • Capitalizes on bonds of trust, especially when collecting personal and sensitive data • Helps minimize potential reluctance, due to power differentials between evaluators and people providing the data, to engage in honest and open dialogue, especially in historically marginalized communities 	Requires strong trust, collaborative norms, and careful attention to assembling an evaluation team that represents multiple groups of stakeholders and attends to power dynamics
	Builds programs' capacity to use data and embed evaluation in ongoing program practice	Funders who are accustomed to more conventional approaches may be skeptical about objectivity and rigor

Source: Evaluation for Equity: Measuring What Matters in Parent Leadership Initiatives by Sara McAlister and Joanna Geller

Focus on External Forms of Evaluation¹⁰³

Evaluation with an **external** evaluator/team of evaluators: there are different ways to consider evaluations in your organisation and to consider external evaluators to be associated with it.

Working/collaborating with external evaluators can be useful:

- When you wish to address evaluation differently than before (for instance, while engaging communities with whom you work in the process of accessing/improving your organisation's overall functioning);
- When you need distance (e.g., an external eye on your organisation, your project or a particular aspect of it);
- When you wish to experiment new tools of evaluation and be more inclusive (for instance while using adapted formats of feedback towards specific communities, through drawing, the use of different languages etc.);
- When you wish to focus on a particular project through a case study approach for instance that may later help to communicate better with potential partners, policy makers or local authorities;
- When you wish to complement a request for evaluation that is more quantitative based and less able to capture the human-based and long-term approach of your project.

Points to keep in mind:

- Time is important before the process starts to identify the evaluators and define together the scope of actions. People involved in the process shall also be informed of the reasons behind the evaluation.
- Adequate funding is needed knowing as well that investments made can have various relevant and positive impacts in the short, middle and long term (acquisition of new tools, additional 'eye' and perspective on one's project or organisation, higher visibility on a project based on stronger qualitative and quantitative forms of evidence etc.)
- Evaluators do not have to be experts in your sector / field of activity but be well informed about it through the preliminary discussions that will then lead to the evaluation protocol.
- To embed evaluation in your project from the start is easier to grasp from the different stakeholders attached to your project / organisation than an evaluation being proposed towards the end of a project where people may feel more checked or being controlled.
- Evaluation results are usually more to confirm evidence, nuance some learning while helping to make changes (that can be subtle but necessary) and communicate better about one's organisation.

CULTURAL LEADERS TOOLBOX

L'évaluation dans la culture: deuxième édition remaniée

A guideline for the evaluation of cultural projects, programmes, strategies, and institutions, Published by Migros Culture Percentage and Pro Helvetia Swiss Arts Council. (French language)

'The Evaluation Journey - A Toolkit for Cultural Operators'

The first part of the toolkit provides an insight into the general principles that structure the evaluation process; the second part lists and explains the various tools to choose from for the evaluation; the Annex includes a blank template, and a visual summary of the self-evaluation process. Produced by European Network of Cultural Centres in partnership with On the Move.

Managing art projects with societal impact in a nutshell

Tools and models with illustrative cases and examples that seek to reflect diverse reader experiences, learning methods and ideas for managing art projects with societal impact.

How to Assess Your Artistic Organisation¹⁰⁴

An organisational assessment is an evaluation of your organisational structure, productivity, workflow, human resources and other assets.

Evaluation approaches

- **Formative:** Formative evaluations are aimed at improving the assessed object (e.g., the work of your organisation). They are usually conducted during the process and provide an opportunity for amendments. They are frequent, ongoing. Their main questions are: what is working; what needs to be improved; how can it be improved. Some examples of formative evaluation are: needs assessment, process evaluation.
- **Summative:** Summative evaluations study the effects or outcomes of the assessed object to determine its overall effectiveness. Summative evaluation is judgmental. Main topics of concern are: what results are correct; whom do they affect; under what conditions; at what cost. Some types of summative evaluation are: outcome evaluation, impact evaluation.

What to assess

You cannot assess everything. Below are some examples of areas of interest that have proved to be relevant for evaluation:

- **Assessing the economic impact of your organisation's activities**
Assessment topics include creating jobs; feasibility of investment; attracting audiences; revitalising places; effect and impact on local businesses; sustainability, developing talent; professionalisation of artists, etc
» Evaluation method: quantitative methods - surveys, statistics, document analysis
- **Assessing how your organisation promotes artistic and audience diversity and social inclusion**
Assessment topics include programming; artistic staff structure; audience structure; minorities; disabilities; vulnerability; income; social inclusion; education; empowerment and so on.
» Evaluation method: quantitative methods – surveys, but also qualitative ones – focus groups, interviews.
- **Assessing how your organisation encourages participation**
Assessment topics include audience identification; audience analysis; attitudes towards art; willingness to

participate, engaging and developing; communication; learning; participation, etc.

» Evaluation method: quantitative: audience surveys, general population surveys and qualitative: focus groups, in-depth interviews, longitudinal studies.

- **Assessing how your organisation develops artistic innovation and artistic quality**

Assessment topics include new ideas; creativity; innovative artistic approaches; professional recognition; programming; artistic quality; partnership; learning; vision, etc.

» Evaluation method: qualitative: in-depth interviews, focus groups, discussions; also document analysis, case study.

How to assess

There are different moments in the assessment process. As a first step, it is necessary to fix a timeframe, delegate the responsibilities to the team members and choose an internal or external evaluator (consider the advantages and disadvantages of external eye(s) and their main focus. Check earlier in this section: Focus on external forms of evaluation). Furthermore, draft evaluation questions related to the project and define values/references, also taking account of the societal dimension.

Once the first phase ends, it is possible to start planning ahead, with the collection of data, using methodologies (Log-frame¹⁰⁵, Most Significant Change¹⁰⁶, Case Study, Freestyle, etc.), indicators (either qualitative/quantitative or linked to evaluative questions) and different tools (questionnaires, interviews, focus groups, observation and others - diaries, exhibition, etc.). Once the data is collected, it is time to analyse it and to build the final report.

Evaluation can be seen as the last step of assessing one's work and leadership but it can also be seen as a cycle; evaluation being a new first step to constantly adapt to changes within the cultural sector as well as beyond and learn from the assessment made.

The last chapter of [The Evaluation Journey](#) offers a selection of tools and exercises and brings insights on some practical approaches to feedback and data collection that can nourish the evaluation. They can be used with teams, stakeholders and communities at various stages of development of a project, programme and more generally with regards to the focus of your evaluation.

8

APPENDIX

DIGITAL TOOLS FOR PARTICIPATORY GOVERNANCE

During the COVID-19 pandemic in 2020/2021 most cultural networks had to deal with different digital tools to replace the physical events and activities they were used to during pre-pandemic times. The staff of these organisations underwent a huge learning process, testing and evaluating these tools contributing to their further development and sharing their experience with colleagues. Many of these tools will remain useful after the pandemic, for pure online events or for hybrid events.

The digital world changes fast, so it is possible that you will not find some of the tools listed below. We have therefore always listed several similar tools which can serve the same purpose, listing programmes by major companies as well as start-ups, non-profit programmes and programmes developed by universities, and we hope that at least some of them will be available for a longer time.

Categories of Digital Tools

- **Complex conference tools for online and hybrid conferences**
- **Tools allowing more flexible online networking activities**
- **Easy tools for online meetings and General Assemblies**
- **Online voting and elections**
- **Tools for group scheduling / fixing dates, brainstorming & cooperation**
- **Tools for online training**
- **Presentation tools**
- **Tools for online cultural activities**

Complex Conference Tools for Online and Hybrid Conferences

All complex conference tools try to imitate live conference venues, offering

- the possibility of having different meeting venues with parallel activities
- an online programme for participants
- the possibility to have different rights for speakers/panellists and regular participants
- sometimes a central venue or virtual foyer
- a virtual expo area
- chat functions
- informal networking areas
- the possibility to livestream and/or record some programme parts or all activities

The differences between the programmes partly lie in the graphic design, in the scope of possibilities you have, in the price you pay and in the complexity of the programme. All the programmes require a substantial time investment to explore the possibilities they offer and adapt them to your own needs. You should also check the pricing (based on registered participants, or on participants who show up, or based on other parameters).

You can also consult a guide on what to keep in mind when choosing a virtual event platform [here](#).

Programmes tested by partners in SHIFT and other European networks:

- [Eventinsight](#)
- [Lets go digital](#) - (tested by European Music Council)
- [HOPIN](#) - (tested by NEMO)
- [Accelevents](#) - (tested by Jeunesses Musicales)
- [Pheedloop](#) - (tested by ISPA)

Programmes compared by SHIFT project partner ELIA:

3D-Software (more expensive, partly not customisable, partly need very good internet connection)

- [Vfairs](#)
- [Inxpo](#)
- [6CONNEX](#)
- [HEXAFAIR](#)
- [Vii events](#)

2D-Software

- [HOPIN](#)
- [Virtual Conference](#)
- [BRELLA](#)
- [RUN THE WORLD](#)
- [V-CUBE](#)
- [SpotMe](#)
- [Eventmobi](#)

Recommendations by ELIA: Eventmobi (most options), Brella (very user-friendly)

Other programmes:

- [Pinetool](#)
- [TRIPPUS](#)
- [Nikkus](#)
- [Talque](#)

Also see list describing and comparing numerous virtual event platforms [here](#).

Tools Allowing More Flexible Online Networking Activities

If you are looking for more informal online networking tools, here are some you can try:

- [Wonder.me](#) (tested by European Choral Association). Very easy to access, only one person needs to register, you have a host password and can share it with others, you can make broadcasts - downside: not available on mobile devices in 9/2021
- [Gather.town](#) (tested by European Theatre Convention). Similar to wonder.me but with more “gaming aesthetics”
- [Trember](#) (tested by European Choral Association). Similar to wonder.me
- [Eventfarm](#)
- [Virtway Events](#)

Also see comparison of different avatar-based virtual event platforms [here](#).

Easy Tools for Online Meetings and General Assemblies

The first need for teams and organisations in the pandemic was to keep in touch within the team and with the membership. Some of these programmes were already used before the pandemic, often with a free basic plan, during the

pandemic many organisations bought premium accounts or tested different programmes until finding the best for their purpose.

Here is a selection:

- [Zoom](#) with breakout groups for meetings
- [Skype](#)
- [Jitsi meeting](#) (Open Source)
- [Teams](#)
- [Google Hangouts](#)
- [Google Meets](#)
- [Slack](#)
- [Trello](#)
- [Schock logic](#)
- [Discord](#)
- [Facebook groups](#)
(more for members being in touch with each other)

For quick communication within the team, some used the chat functions of programmes like Skype and Basecamp, others used one of the following programmes:

- Signal, Telegram, Threema, Whatsapp, Messenger, etc. (these are apps you can find in app shops)

Online Voting and Elections

Most organisations had to organise online General Assemblies and Annual Meetings during the pandemic, which also required online tools for voting procedures and board elections. The partners tested different tools and elaborated on their features and use, see overview [here](#).

Overview on programmes available:

- [Election Runner](#)
 - » also good for organisations with more complicated voting rights
 - » includes the possibility to send out reminders
 - » anonymous and transparent
- [Election Buddy](#)
- [Zoom](#)
 - » good for voting in organisations with simple voting rights (e.g. 1 vote per member and only 1 representative per member present in the online General Assembly)
 - » anonymous voting is possible
- [Digital Wahl](#) German programme, free of cost
- [VotesUP](#) German programme, free of cost
- [Google Forms](#)
- [Pollmaker](#) for simple polls

Tools for Scheduling/Fixing Dates, Group Brainstorming & Cooperation

Programmes for scheduling (can partly also be used for voting)

- [Doodle](#)
- [Dudle](#) programme developed by a German university (open source)
- [Nuudel](#) (open source)
- [Datumprikker](#) Dutch programme
- [Frameadate](#)
- [TheSched.com](#)

Programmes for Online Group Brainstorming

- [Miro](#) zoomable canvas and web whiteboard
- [Lucid Spark](#) (more [alternatives](#))
- [Conceptboard](#) virtual cooperation space
- [Menti](#) to collect feedback and quotes or run a quick poll during an online event and then feed the results back into the event
- **Other programmes:** for further ideas see list [here](#)

Programmes for Online Cooperation

- [Google Workspace](#) (former Gsuite), co-writing documents
- [Basecamp](#) for project management and team communication (also see above), used by the European Choral Association
- [Slack](#)
- [Factro](#) (German project management software)
- [Mattermost](#)
- [Dropbox](#) cloud-based, for sharing files with partners (other, similar cloud storage solutions, e.g. One Drive, offer the same possibilities)
- Also see overview on [management training tools](#)

Tools for Online Training

Webinars and blended training are terms that were already used before the pandemic, and many cultural networks started offering them before 2020.

Yet, they became the core of the educational programme, the capacity building and training offered during the pandemic. Again different programmes can be used with different features and most of the video-conferencing programmes mentioned above can also be used for such online training.

The following two programmes specifically offer webinar functions:

- [Zoom for Webinars](#)
- [ClickMeeting](#)

During the pandemic new programmes were developed specifically for training purposes, here is a list of tools developed for music schools:

- [Google Classrooms](#) free for schools
- [Sirius](#) programme designed for music teaching
- [Doozzoo](#) for online music teaching
- [Match My Sound & Dohrey.me](#)
- [PlayScore](#) mostly for one-to-one singing lessons
- [Go react](#) includes asynchronous learning

A number of European and international networks dealing with music education published lists of tools and offered webinars on online tools for arts education or music education, including SHIFT partner ELIA (see list of Webinars [here](#) and list of useful tools [here](#)) and several member organisations of the European Music Council (see Zoom Lounge [here](#)).

Presentation Tools

The pandemic also brought with it numerous online conferences and meetings where people needed to share contents / make presentations. This was possible using traditional presentation tools in the video conferencing programmes listed above, as well as new, more creative possibilities.

- [Powerpoint](#) is the most well-known programme for linear presentations, part of the Microsoft Office package, also available in G-Suite as well as OpenOffice and LibreOffice. In Zoom Powerpoint could be chosen as virtual background by September 2021, offering more screen space and the possibility to place the picture over a part of the presentation where it is not disturbing
- [Prezi](#) for moving and zooming presentations, not linear
- [Prezi Video](#), allows to integrate presentation elements with online conferencing tools

Tools for Online Cultural Activities

Last but not least, the pandemic meant professionals and amateurs alike were not able to meet physically and play theatre, dance or make music together online. Due to latency issues, most regular conferencing programmes often initially used (such as Zoom, Jitsi, etc., see above) do not allow real common cultural activities online. Again some programmes had been around before the pandemic, for example as a tool for bands jamming together online, yet the pandemic brought a new need and boosted the development of many of these programmes and the creation of new ones.

- [Jamulus](#), open source
- [Sagora](#), based on Jamulus, developed further
- [Jamkazam](#)
- [Soundjack](#)
- [Jacktrip](#)
- [MusicBridge](#), based on jacktrip technology
- [Jammr](#)
- [Cleanfeed](#)
- [Sessionwire](#)
- [Aloha by Elk](#)
- [Sonobus](#)
- [Soundtrap](#)
- [Syncspace](#)
- [LOLA](#), not for private households, connecting music universities
- [Digital Stage](#), supported by the European Choral Association

The use of many of these programmes, however, requires specific technical conditions such as a very good wired internet connection with a good upload rate, the use of an audio interface and good microphone and headset, often you will need a technician or a person with IT skills to set the system up, and the programmes do not necessarily function on all browsers and all devices.

You can also find an overview on different programmes [here](#).

More Digital Tools

A general note on Open Source Philosophy, Creative Commons, Open Source Software:

Our list above represents a mix of commercial and not commercial programmes. In many cases, however, it is possible to replace a commercial programme by an open source software (e.g. LibreOffice instead of Office, Doodle instead of Doodle). There are also creative commons picture collections available online.

Finally, it is possible to contribute to reducing the carbon footprint and contributing to a lower impact on the environment, e.g. by choosing a black background for your presentations and setting your search engines (for example Google) to a version with black background or to directly use Blackle, or by choosing Ecosia as standard search engine.

Further useful lists:

- SHIFT partner ELIA published a list on [programmes for remote work and cooperation](#).
- This curated list of [Digital Engagement - Tools and Suppliers by Modus](#) offers an overview of 25 different **digital engagement** tools, what they mean and their main suppliers, including for example **participatory budgeting, scenario planning, polling, and community mapping**.
- A list of 35 tools for online [brainstorming and decision making in meetings](#).
- A [review](#) of 22 tools for **virtual events**, including an explanation what the tool does, the number of reviews and the score according to the reviews:

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