



MUSEUMS OF IMPACT

FACILITATOR'S GUIDELINES



START HERE!

Welcome to the MOI Framework. This document will explain how you can use developmental self-evaluation to help your organisation on its path towards increased impact. It will explain the nature of the framework and the different ways the process can be carried out in your organisation. It is also intended to help you as the facilitator in managing the self-evaluation process.



MUSEUMS OF IMPACT

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What is the MOI Framework, what is it for, and what are the benefits of using it?

The MOI Framework is an impact-oriented evaluation framework specifically designed to reflect current issues in the societal impact of museums. You can use the framework to take a critical and shared look at your museum's activities and performance to find the potential area(s) for development towards increased impact. It is intended to serve as a self-evaluation tool for the organisation to use when looking for ways to develop its impact.

Self-evaluation helps organisations to identify their strengths and developmental needs. Self-evaluation is a process of observing, analysing, and improving one's own actions or results, and building mutual understanding about the goals set by the organisation for itself and its chosen actions. The organisation evaluates its own activities against its own strategic approach and thus identifies where there is room for development.

Using the framework allows for group performance appraisal, increases shared understanding, demonstrates the current status in different areas, and acknowledges your museum's strengths, resources and goals. Using the framework can be beneficial in various situations, such as while developing a new strategy, or when there are major staff changes, as it can provide a better understanding of the working community and

the current situation of different activities. Using the framework can also be beneficial when a museum wants to make changes in its operations and activities or check its position against its own impact goals.

The MOI! self-evaluation framework is based on the idea of development for increased impact, where the museum has considered how it wants to impact the society around it. Impact goals define why and for whom the museum exists and form the basis for the relevance of a museum. They are formed in constant dialogue and interaction between the museum, its operating environment, audiences, communities and so on, and they are unique for every museum. When a museum has thoroughly considered its goals and is developing its operations based on them, it will be able to improve its impact on its communities and on society at large.

The framework is the result of a European-wide project, tailored to fit museums of various kinds and sizes and their individual contexts. These guidelines explain some ways in which to use the framework, but it is up to each museum to decide how it wants to do this exercise, and to plan its own way of using it. The framework can only support organisations towards increased impact. The actual development is always and only possible if organisations actively and independently take the next steps.

The facilitator's guidelines provide general guidance to help you get started with your evaluation process.

How is the framework structured?

The MOI Framework is designed in the form of modules, each containing a number of impact statements that are the core of the framework. The framework consists of eight modules altogether, divided into Enabler modules and Impact modules. Enabler modules help you to look at issues that are internal, but that act in support of an organisation of impact and enable impact to take place.

The Enabler modules are the following:

1. What we do – Impact goals and strategy
2. How we work – Organisational culture and competences
3. How our organisation functions – Resources and service development
4. How we embed digital into services and processes – Digital engagement

The Impact modules act as the core modules in helping the museum to evaluate different areas currently identified as being of key importance to museums of impact:

1. Communities and shared heritage
2. Relevant and reliable knowledge
3. Societal relevance
4. Sustainable organisations and societies

The modules consist of 151 impact statements altogether that the framework asks the participants to evaluate. These statements do not cover all possible aspects of impact in museums, but have been co-designed and selected with a large number of participants and stakehold-

Enabler modules:



Impact modules:



ers to reflect what we currently see as key elements in strengthening and unleashing the full impact potential of museums. Each module starts with an introductory text, which provides a more detailed insight into the different themes of the framework. As you will see later, it is recommended that each module is started by getting to know the topic through these introductory texts.

Modularity offers more opportunities for museums to tailor the framework to suit their own needs and individual contexts. This means that you can choose to go through the whole framework or focus only on specific modules or sections. You can also choose to focus on certain evaluation and development areas or pick individual themes for closer examination.

The purpose of the evaluation phase is to actively discuss and valorise the different aspects in your own museum's operations and to write the observations down to be utilised in the later phases of the development process. Developmental evaluation is about forming a shared view and improving those aspects that you jointly choose as priorities, not about auditing, reporting, or judging your performance. Its key importance lies in the discussions that take place, the recognition of those elements that you want to develop, and the resulting active development phase.

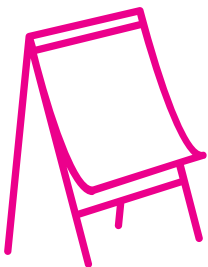
These guidelines also include a glossary at the end, which is intended to help in the evaluation process by explaining how the framework understands certain key terms. The glossary can be used during the evaluation to clarify terms that might be understood in several ways.

How to use the framework



1. **Familiarise** yourself with the idea of self-evaluation and the key concepts of 'Impact and community'.
2. Familiarise yourself with the framework and choose the modules that best fit your needs.

3. **Gather** an evaluation group or groups that consist of staff from different positions and levels throughout the organisation.
4. Choose one or more facilitators from your organisation.
5. **Set up dates** and a space for the evaluation discussions to take place.



6. **Run** the evaluation in the method of your choice, allowing enough time for discussion.
7. Write down key remarks, comments, and conclusions.

8. **Set priorities**: identify the most relevant development areas based on the results of the evaluation.
9. Agree on how to proceed with improving these areas with the help of the Development Workbook document.



Preparation phase

Central concepts: impact and community

Before starting the evaluation, you should take some time to discuss at least two central concepts in the framework, *community* and *impact*, with the participants and what they mean in your museum's context. This helps to clarify the topics and build mutual understanding before the discussions.

Impact and *community* are loosely defined in the glossary to stimulate discussion about the subject in your own context. This means that your interpretations can differ from the ones provided in the glossary.

Impact

Impact means any positive changes that resolve or at least address challenges. Impact occurs because of activities that have outcomes; your activities have an impact if they contribute to a desired change for stakeholders or in society.

Impact goals are objectives that the museum has set to define where it wants to have an impact in society and in its communities. These objectives are based on the choices that the museum makes about which societal challenges or problems it wishes to address, change and have an impact on. Impact can also arise from operations with less or no specific goal-orientation. Desired impacts, however, which are goal-oriented, can be developed, monitored, evaluated and communicated.

Communities

In the MOI Framework, community is understood as self-defining: by valuing and wishing to pass on specific aspects of cultural heritage, in interaction with others, an individual becomes part of a community. A community can be defined in various ways without necessary references to rigid communities. Such a community may have a geographical foundation, for example, shared humanist values or past historical links. But equally, a community may arise out of a common interest.

Museums can work with local and residential communities but also, for example, with communities born out of a common hobby, expertise, way of thinking or acting in online virtual communities. The idea of shared / common heritage encourages museums to work with different communities in defining, interpreting and presenting heritage.

Before starting the evaluation, it is highly recommended to discuss the following questions:

1. Have we set impact goals for our operations?
2. What are our impact goals?
3. In light of our impact goals, who are our most important communities?

What to do before the evaluation?

Before starting the evaluation, you may wish to take some time to discuss and decide on the evaluation process that best suits your museum. It is recommended that at least facilitators but potentially also the participants familiarise themselves with the whole framework and the content before carrying out the evaluation itself.

Before starting, you may also wish to take some time to discuss the goals of your evaluation and to consider your commitment to the development objectives that will arise from the results of the evaluation.

The most important issue is to plan the process so that it best supports joint discussions in the museum. When planning the evaluation, it should be noted that reaching an agreed score for each evaluation statement is not the only important aspect. The viewpoints that the participants exchange during the evaluation process are just as significant, which is why it is important to allow enough time for discussion and also to document key aspects of it.

The museum chooses the evaluation modules that it wants to focus on in the self-evaluation. It is recommended to start the evaluation from *Enabler* modules and to move on to *Impact* modules. The first Enabler module – *What we do – Impact goals and strategy* – is recommended as a starter for the evaluation. However, there is no strict requirement to follow a certain order in the evaluation.

There is more than one way to carry out the evaluation. For example, you can decide...

- which and how many modules you choose to focus on
- how you will assemble the evaluation group(s)
- how many evaluation groups it is necessary to form
- how many facilitators and rapporteurs are needed to support the process

How much time to reserve?

It is advisable to take some time to set up suitable dates and premises for the evaluation discussions. You can plan and schedule the evaluation sessions according to your own needs. It is recommended to take enough breaks during the process.

Several sessions will be needed if the evaluation framework is carried out in its entirety. Generally, it should take about one working day to go through all Enabler modules, and half a day to carry out one Impact module. It takes approximately three days to carry out the whole framework. These timeframes are purely theoretical and will vary from context to context. To keep the participants engaged and the discussion quality high, it might be advisable to carry out one or maximum two modules per day. Remember too that the Development Workbook takes some time to discuss and complete.

Does the size of the museum affect how the process is run?

It is clear that the evaluation process will differ depending on the size of the museum. No definitive guidelines can be given on how to organise the evaluation process, or on who and how many persons should participate because museum contexts vary so much. This has to be designed in each instance by the organisation itself. However, one key element in the evaluation is its participatory nature: as many employees as possible should be able to have their say and participate in the discussion. Sometimes this involves the whole staff, and sometimes it requires only some of the staff to participate, possibly even in evaluating different modules. Consider what would be best in your organisation and plan your own process. Use the opportunity to interact and encourage people to meet in unexpected ways.

In small museums, everyone can participate in the evaluation. It is recommended that you choose one facilitator. However, in a small museum, it may be necessary for the facilitator to also take on the roles of rapporteur and participant in the discussions.

In bigger museums, it is recommended that the group consists of representatives from all of the different professional groups working in the museum or organisation. The recommended number of participants per group is 10–15. With larger groups, it is recommended that you choose a separate facilitator and rapporteur to manage the process

more effectively. To generate a fruitful discussion, it is also recommended to check out the facilitation tips in the additional resource links.

Roles of participants

There are different roles to be played in an evaluation process. One key role is the facilitator, who is a necessary element in running a participatory, communicative evaluation process. Other roles are played by the rapporteur and the participants.

Facilitator

During the discussion, the facilitator helps the participants or a group of participants to work together effectively, to understand common objectives, and to plan how to achieve these objectives during meetings or discussions. The facilitator leads the discussion in the right direction if necessary and should be able to intervene if the discussion is dominated by certain participants, or if the perspective narrows, namely if the discussion is influenced by the familiar hierarchy of the team. Facilitators do not usually participate in the decision-making but concentrate on supporting the process. In most cases, one facilitator is enough for evaluation groups, but more than one may sometimes be needed.

Rapporteur

The role of the rapporteur is to document the discussion in the workbook, or using some other preferred means. The role can be taken by the facilitator, but in practice it is difficult to facilitate and document at the same time. It is therefore recommended to select a separate rapporteur. '

Museum staff – participants

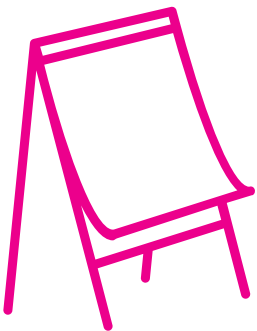
The broadest possible range of staff should participate in the evaluation. In smaller museums, everyone can participate. In bigger museums, it is recommended that the group consists of representatives of all of the different professional groups working in the museum. In general, the more diverse the participants, the better the result. The self-evaluation process should be democratic and inclusive – try and choose from all levels of the museum. Staff "on the floor" can provide meaningful insights into the functions that make up the core of the museum.

Carrying out the evaluation

What happens during the evaluation?



1. Choose the modules you want to evaluate.



2. Start the evaluation discussions using the workbooks.
3. Evaluate the statements of the chosen modules using the scale provided in the workbooks.
4. Take notes on the most important aspects and arguments arising from the discussions in the note boxes provided in the workbooks.
5. Summarise the evaluation results and most relevant development objectives in the "Priority setting" part at the end of each module.

6. Discuss how to proceed with the development plan. Make a concrete plan with the help of the Development Workbook document.



The core of the evaluation process is to consider the evaluation statements in your context and to score them together. These discussions will provide you with a better understanding of where to go next on your way to a museum of impact.

There are three ways to use the MOI Framework:

- the **Classic** way using workbooks
- the **Visual** way using the MOI board in addition to the workbooks, and
- the **Creative** way using the MOI playing cards.

The Classic way is to use the workbooks, but using the MOI board can help you to visualise your museum's priorities. Both ways follow a similar process but use different tools. The MOI playing cards give you the freedom to use the framework creatively and playfully.

As this is a self-evaluation exercise, there is no definitive way of running the process. The workbook provides a recommendation on ways that have been designed to be the most effective and are best supported by the materials. However, once you are familiar with the process, you may freely decide to deviate from the workbook if you consider another way to be more appropriate for your purposes. The framework is only a tool, and the key aim is to help you proceed along your development path.

Scale and decision-making

At the core of the evaluation are the evaluation statements or questions that the participants discuss before deciding what kind of performance value to give. This scaling reflects your mutual understanding of where you stand as an organisation in relation to what the statement says. Each statement is evaluated on a scale from 1 to 5, where 1 indicates that the topic is not currently realised well, and 5 denotes that the topic is currently realised very well.



1 Realised extremely poorly:

There is no proof of the existence of the matter, and it has not been discussed

2 Realised below average:

The matter is under discussion and will be developed, but there is no proof of its existence yet

3 Realised satisfactorily:

The matter is being implemented, but it has not been evaluated or developed

4 Realised well:

The matter works well in practice, and it is being evaluated and developed

5 Realised extremely well:

The matter works in practice, it is being evaluated and developed, and it is a particular strength as far as operations are concerned

If it is difficult to form a clear view in the evaluation group and to decide on a value regarding a particular statement, scale value 3 should not be used as a compromise. Rather, the issue in question should be examined in light of the scale value definitions (for example, 2 – *the matter is under discussion and will be developed, but there is no proof of its existence yet*), and considered from the point of view of the museum's cur-

rent performance level. Mutual understanding should always be based on concrete evidence from the museum's operations, and the concrete results achieved through these. The group can also decide on a voting mechanism, if it seems a useful device to apply.

The following steps might be helpful in the formation of a joint view:

1. The issues that are central in any particular evaluation statement are identified. At the same time, the issues that are agreed upon and not agreed upon are identified. The most important observations and remarks are registered.
2. The main differences are discussed. Views can be recorded, even if full agreement is not reached.
3. You can also leave a statement unscaled, if it turns out to be too difficult to scale, or not at all relevant for your organisation. However, consider why you were not able to reach a conclusion in the discussion. Maybe such an issue is worth returning to later.
4. Do not let a difficult statement stop you from proceeding to other, possibly more valuable questions.

Below, the guidelines will explain the three different ways of running a self-evaluation exercise using the MOI Framework.



The classic way: workbooks

The classic way of running a self-evaluation process is by making use of the MOI workbooks. You do not need any other tools for this process apart from the workbook files for each module you have chosen to focus on.

Each module has its own workbook. These are in editable PDF format, which means that you can record both the discussions and the scaling

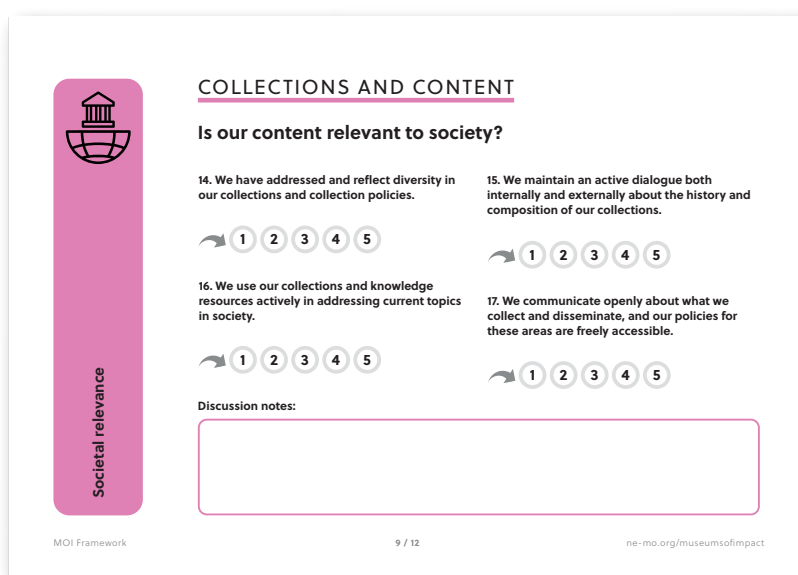
in these workbooks and save them for future use. The workbooks can be used flexibly: there is no need to evaluate every statement or even every theme in the module if they are not relevant or applicable to your museum. The workbooks themselves will also provide you with guidance on how to use them.

The process of the classic evaluation can be divided into three phases: Introduction, Scaling, and Wrap-up and priorities setting.

In the Introduction phase, you can make use of the paragraphs at the start of each workbook describing the contents and objectives of the module, in order to align the group to the topic. After that, you can proceed to the Scaling phase.

In the Scaling phase, you look at the evaluation questions by each subtopic. For each subtopic, you can provide a short introduction with the help of the guidance questions for each subtopic. The group then evaluates each statement using the 1 to 5 scale, the facilitator takes note of the evaluation directly in the workbook by selecting the right value button, and uses the "Discussion notes" box to record comments/topics that arise from the group.

The most important observations and arguments regarding the evaluation statements should be recorded because it can be difficult to remember later what was discussed during the evaluation and why a certain scale value was used. It is therefore strongly recommended that the facilitator and/or rapporteur use the "Discussion notes" space in the workbook, in addition to choosing the scale value.

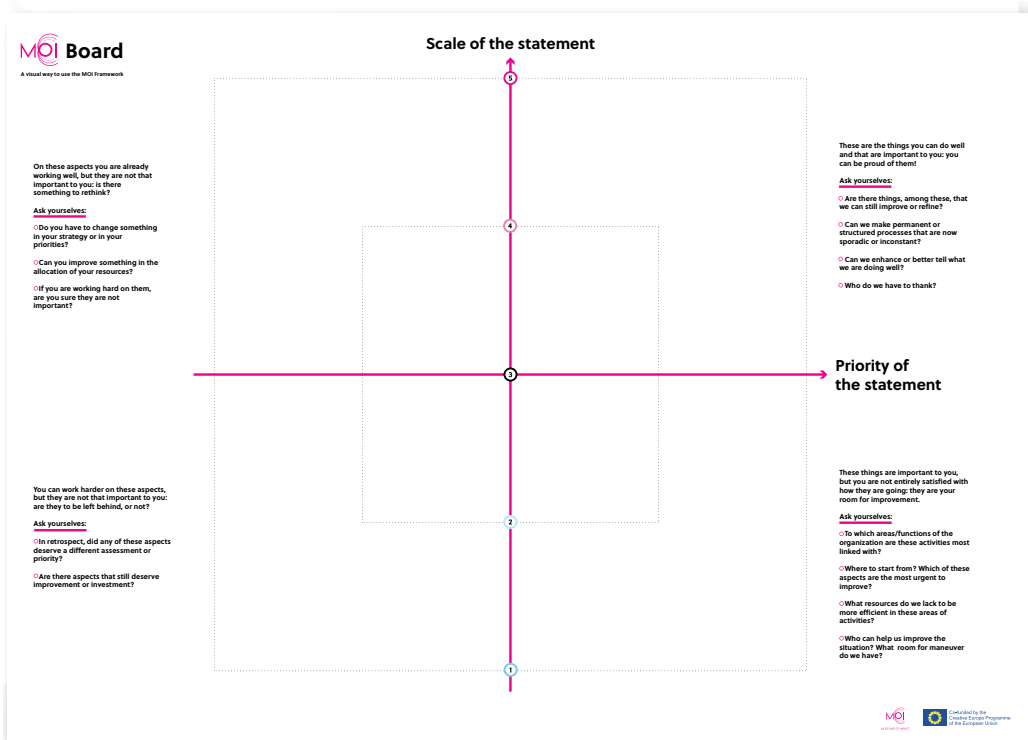


The Wrap-up and priorities setting phase brings the discussion of a module to a close. During this phase, the group sets out two key issues for each module:

- What are the strengths of our museum concerning communities and shared heritage, and how do we reinforce them further?
- What do we need to improve?

All the statements and their scale values can also be filled in on the final summary page of the workbook and the setting of your priorities can be based on these. This section will prepare you for the development plan, as it is an opportunity for you to recall the most important points and development areas that you identified during the completion of the module.

After completing this phase, your evaluation of a module is ready. You can now either move on to another module or finish the evaluation phase. However, the development path of your organisation is only beginning. Remember to transfer the results to the Development Workbook, which is supplied as a separate document. This will help you to plan in a more concrete manner the *what*, *how* and *when* of the next steps in the development process. If you are addressing multiple modules, you can complete all of them, and then transfer all the results simultaneously to the subsequent development phase.



The visual way: the MOI board

In addition to the classic way of using MOI workbooks, you can utilise the MOI board for the evaluation process. The board is a printable canvas with two axes, one for the Scale (Evaluation) and one for Priority, which you can use to visually display your evaluation results for further discussion. The MOI board can be printed from the NEMO website with detailed instructions, or a simple version can be made at the museum. In addition, you will need sticky notes and pens for the participants. The board can be printed out for use, but also used in digital format. The board itself provides further instructions on how to use it. The facilitator should, however, remember to fill in the workbook with the scores and the discussion notes. In addition, you can also document details on the board itself.

When using the MOI Framework in this way, the workbooks are used only by the facilitator to present the module, its subtopics and statements. The participants go through the statements one by one, as in the classic evaluation, and decide on the scaling. However, they should also discuss and decide on the priority of the statement. After this, they place sticky notes with the statements written out on the board depending on the scale value (vertical axis) and their priority (horizontal axis) or importance against the organisation's impact goals. For example, if you

scale a statement high, and estimate that it is of high priority, place a sticky note somewhere in the upper right quadrant.

The four quadrants on the board represent different levels of performance. In the quadrant where both the scale and the priority receive a high ranking are those aspects that you can do well and that are important to you. In other words, you can be proud of them.

Ask yourselves:

- Are there any items among these that we can still improve or refine?
- Can we make permanent or structured processes out of processes that are currently sporadic or variable?
- Can we enhance or communicate what we are doing well more effectively?
- Who do we have to thank?

In the quadrant below are aspects that are important to you, but which you are not entirely satisfied with: they signify your room for improvement.

Ask yourselves:

- To which areas/functions of the organisation are these activities most closely linked?
- Where to start from? Which of these aspects are the most urgent to improve?
- What additional resources do we require in order to be more efficient in these areas of activity?
- Who can help us improve the situation? What room for manoeuvre do we have?

In the quadrant where you evaluate your performance high are aspects that are already working well, but which are not considered a priority. Is there something that needs rethinking?

Ask yourselves:

- Do you have to change something in your strategy or in your priorities?
- Can you improve something in the allocation of your resources?
- If you are working hard on them, are you sure they are not important?

In the last quadrant are those statements which you do not scale high and which are also not priorities for you. You could work harder on

these aspects, but they are not that important to you. Are they to be dropped, or not?

Ask yourselves:

- In retrospect, did any of these aspects deserve a different assessment or priority?
- Are there any aspects that still deserve improvement or investment?

At the end of each module, look at the four quadrants and re-read the statements you have placed in each of them. Take your time with the group to see if you are satisfied with the overall picture and whether it reflects your final self-assessment. Revisit the workbook and record your thoughts in a manner similar to that adopted in the classic way: the Wrap-up and priorities setting phase brings the discussion of a module to a close. This phase requires the group to set out two key issues for each module:

- What are the strengths of our museum concerning communities and shared heritage, and how do we reinforce them further?
- What do we need to improve?

After completing this phase, your evaluation of a module is complete. You can now either move on to another module or finish the evaluation phase. However, the development path of your organisation is only beginning. Remember to transfer the results to the Development Workbook, which is supplied as a separate document. This will help you to plan in a more concrete manner the *what*, *how* and *when* of the next steps in the development process. If you are addressing multiple modules, you can finish these first, and then transfer all the results simultaneously to the next development phase.



The creative way: the MOI playing cards

The MOI playing cards are a supplementary tool for the evaluation framework. They present MOI evaluation statements in an attractive and inspirational form that helps the museum to use the framework in creative ways. In this way of using the framework, the only limit is your imagination. There is no need to use the workbook or any other tools, but you can of course design your own process with additional tools of your choosing. The main purpose of the cards is to facilitate discussion about the impact in your organisation.

You can download the cards from the NEMO website, where you will also find a few suggestions on how to use them, but museums are free to come up with their own ways and situations. Be creative, see the cards as a playful way to enable development.

You can print the whole selection of cards or just those you need. The cards will work best if you print them on slightly thicker paper, in colour or in black and white. They can also be printed in a more permanent format if preferred.

What happens after the evaluation?

Towards a museum of impact

The evaluation process is not the final point in developing your museum, but rather a tool to help you identify issues to support this process. Once you have completed the evaluation process, you will be able to identify development objectives and to create a development plan based on the evaluation results.

When you have completed the chosen evaluation modules, you can start the process of creating a development plan. When registering the development objectives, it is useful to be as concrete as possible. This makes it easier to pinpoint afterwards what was said at the time. In addition, it will be easier to check and verify how the development objectives have been carried forward.

Using the Development Workbook

After the evaluation process proper, it is highly recommended to take what has been learned to the next level with the help of the Development Workbook. This is a separate document designed to help your organisation take the next steps on the path to increasing your impact. It is available on the NEMO website.

The Development Workbook will help you to define and prioritise the development areas, and to set concrete goals and steps for achieving them. It is intended for making use of and reflecting on the strengths and areas/subjects for improvement documented at the end of each module, and for considering the development ideas that were discussed in your group.

The workbook is divided into two parts, with the first part used for selecting the most relevant development ideas, and the second part for helping to make them more concrete by considering the necessary goals, information gaps, resources, persons involved and timeline. Remember to have your strategy and impact goals in mind to enhance your museum's impact.

After you have completed the MOI Development Workbook, you can proceed with writing your development plan of choice to guide your next steps on your development path towards achieving a stronger impact.

We wish you good fortune on your path towards a greater impact!

Practical tips for facilitators

Before the evaluation session

Prepare before the evaluation session

- Know your topics well and ensure that the participants in the evaluation have a clear idea about the impact goals.
- Reviewing the framework will help you feel more confident about the topic.

During the evaluation

Manage the session wisely

- Foster a positive group atmosphere by maintaining an optimistic tone and a fair amount of humour.
- Participate actively during the evaluation session and ensure a smooth flow of conversation through strategies, resources, and ideas for the group to work with.
- If you think that you cannot moderate the discussion and take notes simultaneously, please consider appointing a rapporteur to take notes.
- Be aware of the evaluation participants' body language.
- Allow time for final questions for increased output after each module.
- Bring closure at the end of each question.

Ensure active participation of all evaluation participants

- Ensure that everyone feels confident to participate equally. Try to stop individuals from setting themselves apart from the group. A good idea is to try to draw out quiet people and limit those who talk a lot. Timed discussions for all participants could facilitate equal participation.
- Direct participants back to the topic when they digress and explain details when you feel that contributions are too ambitious.
- Ensure that hierarchy within the organisation is not reflected in the participants' answers, involvement, and turn-taking. Lack of hierarchy will also be reflected in the role you will assume as a facilitator. A facilitator acts as a guide to help people move through the evaluation session together, eliciting answers and ideas from the evaluation participants.

Monitor the scaling and voting process

- Ensure that all evaluation participants take part in the scaling and possible voting process.
- Explain how the scaling procedure and models work.
- Highlight the meaning and purpose of scales when you think the evaluation participants find it challenging to evaluate certain questions.
- Highlight the importance of what people have to say and the value of the evaluation as a learning process.

After the evaluation session

Show appreciation

Be sure to thank all participants to show your appreciation of their contribution, and let everyone know how much you enjoyed moderating the discussion and valued their active participation.

Ensure continuity

Ensure that the answers are connected to the development plan.

Resources for inspiration

[Top 10 Dos and Don'ts for Effective Facilitation | MURAL Blog](#)

[Developing Facilitation Skills](#)