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Interfolk, EDUCULT

**Version4-approved**

**Guidelines for the Baseline Survey**

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## 1. The project rationale

### 1.1 Background and need

The huge civil society sector of amateur arts, voluntary culture, and heritage[[1]](#footnote-1) in the European member states not only provide joy, friendship, and meaning for the participants, but it can also support and strengthen societal benefits.

However, these potential for fostering societal benefits can be improved by a more conscious development work by the learning providers in the sector (multiplication to the direct target groups); and by a strengthened support from the key stakeholders (mainstreaming to the indirect target groups).

There is need for developing new tools and methods to improve the work with the many potentials for societal benefits.

### 1.2 Project aim

The aim of the project is to support lifelong learning providers in the sector of amateur arts, voluntary culture, and heritage to work more consciously and systematic in promoting societal benefits. Until now, learning providers in the sector can use many good practice examples as inspiration and support.

However, there is a need of more systematic tools and methods for the learning providers on how to concretely assess their own activities and implement improved practice. The first step is to provide a baseline survey to clarify the societal benefits’ categories and levels for benchmarking.

### 1.3 Societal benefits – Problem definition

In former EU projects, some of the partners have worked with different aspect of the mentioned societal benefits, such as social inclusion, social cohesion, and active citizenship:

Typically, the meaning of “social inclusion” [[2]](#footnote-2) in the field of arts and culture implies:

* to ensure **equal opportunities** for all to have access to and enjoy arts and culture
* to enable full and **active participation** of every member of the society in all aspects of life, incl. arts and culture. (**counter discrimination** due to social background, education, income, ethnicity, gender, or mental or physical disabilities).
* to **empower** (and cultivate) poor and marginalized people to take advantage of burgeoning global opportunities, also in the area of arts and culture. [[3]](#footnote-3)

Typically, the meaning of “social cohesion” [[4]](#footnote-4) implies:

* To promote **mutual recognition** between different social groups
* To ensure **mutual trust** between the citizens
* To enable **co-creative** artistic and cultural activities

Furthermore, we have other key concept for social change or societal benefits that are important in the field, namely “active citizenship” [[5]](#footnote-5) also in the field of arts and culture that implies:

* To be engaged in activities that sustain and **promote democratic** values and attitudes,
* To be **involved in communities** and democracy at all levels from local to national and global.
* To be **committed to the common good** and the welfare of society.

## 2. Aim of the Baseline Survey

The Baseline Survey aims at researching concrete success factors and challenges of promoting societal benefits with stakeholders from the sector.

The Baseline Survey aims at identifying pre-conditions, success factors and main barriers of social benefit promotion in amateur arts and voluntary culture activities in order to define categories and levels that need to be considered in a benchmarking system.

The expected impact of the Baseline Survey is not only to sensitize the stakeholders that will be included in the research on the topic and on the project but also to support the sector in a long-term perspective by providing a survey on the matter.

## 3. Methodology of Baseline Survey

### 3.1 Framework of Data Collection

Methodologically data collection includes literature review, but will focus on at least 30 expert interviews (6 per country) and 5 focus groups (1 per country) with selected and experienced learning providers in the field of amateur arts and voluntary culture on their perspectives concerning the research questions.

Each partner will make summaries of the data collection, with 4-6 pages summarising the results of the interviews and the focus group discussion. The summary is provided in English.

After that the collected data will be summarized along the research question in one edited document, providing recommendations on how pre-conditions, success factors and challenges need to be considered to be a socially inclusive organisation/learning provider and when implementing socially inclusive activities.

* Number of Interviews: 6
* Number of Focus Groups (Group Discussion): 1
* Target Group: Learning Providers
* Format: Face-To-Face or via video phone (preferably zoom)
* Recording: We suggest that each partner records their interviews, but it is not obligatory. It is only helpful in order to have an open conversation with the interviewees.
* Atmosphere: Open atmosphere of a respectful conversation, that aims at covering most of the research questions.
* Anonymity: Please ensure the interviewees that their comments, statements, etc. will be treated anonymously and that in case that we would like to use one of their quotes non-anonymously, we will request their authorisation.
* Support by Lead Partner: At any moment in the data collection process, in which you would like to speak to reflect on it or discuss specific challenges please do not hesitate to contact the lead partner.

### 3.2 Interview Invitation

Dear Mr./Ms. …

Our organisation is currently participating in an Erasmus+ project on societal benefits that arise from activities in the sector of amateur arts and voluntary culture. Together with partners from Denmark, Poland, Slovenia, Ireland, and Austria we aim at facilitating exchange on how activities in the sector can promote social cohesion and social inclusion. Based on this, we attempt to provide support to organisations in the sector in reflecting on the inclusiveness of their activities and how they promote mutual trust between different societal groups.

Departing from this idea, we would like to talk to experienced persons from the sector of amateur arts and voluntary culture about their experiences with regard to societal benefits through activities in the sector. We would like to find out if societal benefits such as social cohesion and social inclusion are a conscious aim when organising and conducting such activities, what experiences there are with the matter and what representatives from the sector would recommend to somebody who attempts to promote societal benefits through their activities.

Therefore, we would be very happy if you would be willing to give us an interview on your experiences and perspectives on the issue. The interview (according to your preference face-to-face or in a video meeting) will last about 1 hour and will be an open conversation. Your comments, statements, etc. will be treated anonymously.

Your contribution would be very valuable to the project. We are looking forward to talking to you!

### 3.3 Questions for Interviews and Focus Group

1. Which organisation are you working for and in which function?
2. What activities do you offer and for what purpose? Which target groups do you want to reach?
3. In what way do your activities support mutual trust and recognition between different people?
4. In your experience, what are factors that support and what are factors that impede building mutual trust and recognition between different social, economic, or cultural groups?
5. Does that mean that you also aim at attracting an audience with a variety of social, economic, or cultural background in your activity?
6. Do you (intent to) reach also vulnerable groups and persons that – due to their social, economic, or cultural background – are normally excluded from participation in cultural life?
	1. Could you give any examples of what you do in order to reach and include these groups, to provide these groups access to your activities?
7. In your experience, what are the challenges in reaching and including such new audiences and disadvantaged and potentially socially excluded groups?
8. From your experience, what do you think needs to be in place during your activities in order to make it successful in term of being inclusive and accessible to excluded groups?
	1. Potential sub-question: what preconditions in terms of the communication, the format, atmosphere and place of the activity or the membership in the organisation?
9. In what way do your activities contribute to building and strengthening democratic values? What are important factors that this can happen?
10. Is there anything else you consider important if organizations in amateur arts and voluntary culture want to boost social benefits?

[Please keep in mind to find out about the following areas and functions when implementing the interviews and focus group; not needed to always cover all areas, but to have an eye on them:]

1. Activities & events
	* Programming
	* Promotion & programme materials
	* The formats of the activities
2. Organizational culture
	* The atmosphere in the organisation
	* Mission statements & policy papers
3. Career opportunities for active members (recruitment, education, positions of responsibility)
4. Demographics
	* Profile of members
	* Profile of boards and staff
5. Collaboration with other organisations and groups
6. Management aspects
	* Decision-making processes
	* Commitment of resources/budget
	* Suppliers & procurement policy
	* Monitoring & evaluation processes

### 3.4 General Structure of Summary

* Idea: Descriptive Summary of the interviews and the focus group that has been conducted.
* Structure: Summary from each interview and from the focus groups along the lines of the interview questions, supported with interesting quotes if available and a short description of the interviewees and focus group participants, i.e.:
	+ Summary of Interview 1 (max. three thirds of a page)
	+ Summary of Interview 2
	+ Summary of Interview 3
	+ Summary of Interview 4
	+ Summary of Interview 5
	+ Summary of Interview 6
	+ Summary of Focus Group
	+ Comments on observations, findings, comparisons, recommendations, etc.
* Length: Max 6 pages, font type: Calibri; font size: 11; line spacing 1,15; margins: Top 3; bottom 2,5; left and right 2,5.

## Task schedule for O1: Baseline Survey

|  |  |  |  |
| --- | --- | --- | --- |
| **No** | **What - Key activities** | **Who** | **When - Period & deadlines** |
|
| KA1 | Initial dialogue on aims and frame of survey  | All | Oct 2020 |
| KA2 | Outline draft survey guidelines | IF & EC | 26 Oct 2020 |
| KA3 | Dialogue on draft guidelines at zoom meeting | All | 2 Nov 2020 |
| KA3a | Decisions about scope and approaches at PMG | PMG | 4 Nov 2020 |
| KA4 | Present draft guidelines for baseline survey | IF & EC | 12 Nov 2020 |
| KA4a | Comments to the draft guideline | All | 16 Nov 2020 |
| KA4b | Final guidelines including appendices are provided | IF & EC | 20 Nov 2020 |
| KA5 | Send short survey status to other partners including profile of selected group of respondents  | All | 15 Dec 2020 |
| KA6 | Data collection: Complete interview series  | All | Medio Nov – Primo Feb 2021 |
| KA7 | Data collection: Complete focus group | All | Medio Nov – Primo Feb 2021 |
| KA8 | Provide local draft summary report of interviews and focus groups, own languages (5 pages)  | All | 15 Feb 2021 |
| KA9 | Translate English local report to English (5 pages)  | All | 20 Feb 2021 |
| KA10 | Editor present draft survey report, 40 pages, English | IF | 28 Feb 2021 |
| KA11 | Dialogue in partnership on draft report  | All | 5 Mar 2021 |
| KA12 | Final text is provided for proof-reading | IF | 10 Mar 2021 |
| KA13 | English proof-read delivered | VCC | 15 Mar 2021 |
| KA14 | Final English version is published  | IF | 20 Mar 2021 |
| KA15 | Lead partner tasks during the period | IF | 1 Oct 2020 -20 Mar 2021 |

1. Here is used a tripartite division of the sector, where “heritage” is included together with “amateur arts” and “voluntary culture”. [↑](#footnote-ref-1)
2. The definition used by United Nations is: “Social inclusion is defined as the process of improving the terms of participation in society, particularly for people who are disadvantaged, through enhancing opportunities, access to resources, voice and respect for rights.”

See <https://www.un.org/development/desa/socialperspectiveondevelopment/issues/social-integration.html> [↑](#footnote-ref-2)
3. See <https://www.igi-global.com/dictionary/social-inclusion/27360> [↑](#footnote-ref-3)
4. See the State of the Art survey from the BRIDGING project; or EU Commission about “social cohesion” in the context of culture and creativity: <https://ec.europa.eu/culture/policies/selected-themes/cohesion-and-well-being>. [↑](#footnote-ref-4)
5. See <http://lllplatform.eu/policy-areas/xxi-century-skills/active-citizenship/> [↑](#footnote-ref-5)