JPI CH Conservation, protection and use Joint Call, https://www.heritageresearch-hub.eu/call/conservation-protection-and-use-joint-call/
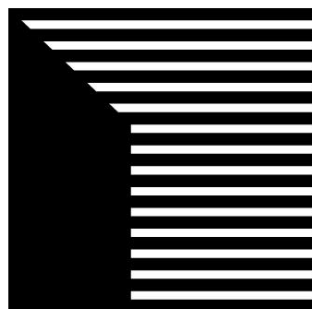
CURBATHERI

Curating sustainable urban transformations through heritage

Social Impact: Indicators Matrix

Measuring the social interactions in research projects

WP5. DELIVERABLE 5.1.

DEEP CITIES
Curating sustainable urban transformations
through heritage

PROJECT PARTNER CONTACT INFORMATION

Project title	Curating Sustainable URBAn Transformations through HERItage
Acronym	CURBATHERI
Project Leader (PL = PI 1)	Torgrim Sneve Guttormsen torqrim.guttormsen@niku.no Norwegian Institute for Cultural Heritage Research Oslo Norway
Principal Investigator 2 (PI 2)	Kalliopi Fouseki kalliopi.fouseki@ucl.ac.uk University College London London UK
Principal Investigator 3 (PI 3)	Chiara Bonacchi Chiara.bonacchi@stir ac.uk University of Stirling Stirling UK
Principal Investigator 4 (PI 4)	Michele Nucciotti Michele.nucciotti@unifi.it Universita di Firenze SAGAS Department Florence Italy
Principal Investigator 5 (PI 5)	Margarita Diaz-Andreu m.diaz-andreu@ub.edu ICREA, Universitat de Barcelona Barcelona Spain

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Content

1. Introduction

The **evaluation and recommendations work package** (WP5) **oversees the assessment of the project's challenges and advances, as well as serving as a laboratory for delving into new participatory evaluation strategies**. At the University of Barcelona, we set ourselves the task of working in such a way that our research would be useful at different stages of the project. **One of the aims of this package is to be able to conceptualise tools that allow us to analyse the social impact of the project's actions and activities: both in fieldwork and knowledge-transfer**. To this end, we consider that the configuration of an **indicators matrix** would create both an internal and external tool that could be used by our different stakeholders and partners and become an instrument that could be extrapolated to other projects. It could also act as a tool to improve internal evaluation.

One of the **most innovative proposals of this project is to work with several evaluation approaches (internal and external) that allow us to measure society-individual interactions in the short and long terms and at the different stages of the project**. Building on this project's participatory and community-based nature and methodological and practical work packages, **we aim to generate a holistic evaluation framework of what is meant by social impact by fostering a "proactive sense of research"**. One of these proposals is to **work with an indicators matrix** that, on the one hand, allows us to evaluate the tasks carried out in the work packages (WP2-3) and, on the other, to work with the overall evaluation of the project's social impact.

In broad outline, for measuring the social impact of a heritage-led project it is first necessary to have a clear idea of the meaning of the concept of impact itself and its polysemic significance. **What is "impact" and what does its aimed-for social dimension mean?** Is this impact the effect of an activity or action on the well-being of individuals and communities? Must it always be "positive" or "negative"? In this respect, the task of developing a sound conceptual framework is therefore an essential prerequisite to providing advice on the strategies for the measurement of social impact(s) in our field of expertise. In this case we will focus on the impact on society, understood as the communities of interest.

This document will bring to light some comparative analyses and proposals based on indicators to measure social impact in heritage projects. The first task here will be to discuss the concept of "social impact". Thus, beginning with some general examples. The National Heritage Lottery Fund[1], a well-known UK foundation for heritage-led participatory projects, instead of providing a definition, indicates that the **social impact** (of a project or action) **could be analysed on an individual or community level,** in terms of considerations linked to social approaches to heritage management (Heritage Lottery Fund 2011, 8). It draws on a variety of concepts, including intrinsic and extrinsic benefits, wellbeing, community cohesion and social capital formation (see Graphic 1.).
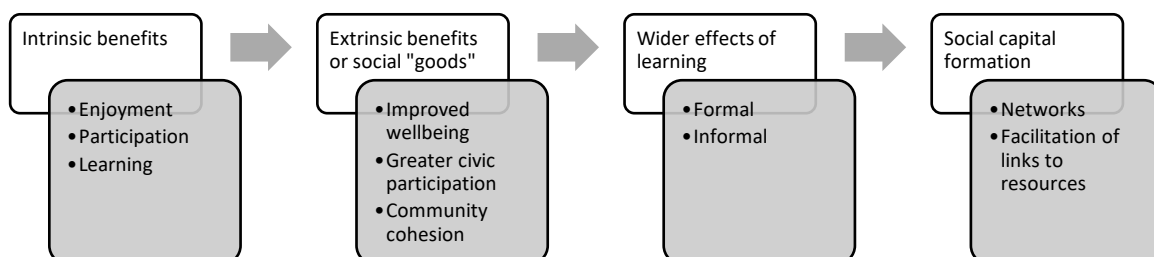
Graphic 1. Positive social impacts of culture (Heritage Lottery Fund 2011, 8).

The NHLF cross checks those positive social impacts of culture with a series of key benefits. In addition, in the benchmarking section of this report we will analyse the current evaluation system based on NHLF outcome analyses. However, we found it relevant to highlight here some of the social benefits that this institution has studied since 2006 (Heritage Lottery Fund 2008) (see Table 1).

Benefits to individuals	Increasing knowledge and understanding of heritage
	Providing enjoyment, inspiration and creativity
	Developing personal skills and abilities
	Influencing attitudes and values
	Leading to changes in activity, behaviour and progression
	Health
Benefits to Communities	Providing community focus
	Social cohesion
	Social inclusion
	Strengthened organisations

Table 1. Key benefits for individuals and communities by the HLF (2008).

It is very interesting to corroborate how social impact reports evolve. In this 2008 report, the term indicators does not even appear, but is related to the idea of benefit that we later explore in Section 2.5. As can be seen above, there is a division between community benefits and individual benefits. In our opinion, the terms social cohesion and social inclusion can be seen as very broad, polysemous and, in most cases, complex to measure. Nevertheless, most projects require us to discuss or define what the social impact of our work will be, even if we don't even know what this actually means. In our view, there can be no single social impact and the very idea that there is only one is patronising, as this would be a very academic view. **In our opinion, it is important to reflect on the plurality of the term and convictions. Perhaps in this study we can assess social aspects and interactions, rather than impacts**.

Coming back to the Deep Cities project, it encourages transdisciplinarity and different uses of documentary and participatory ethnographic techniques to understand the heritage value of urban transformations for their application to sustainable preservation solutions. This project, which fosters the coexistence of different narratives and discourses related to heritage, aims to have a broad social impact on both communities of interest and policy makers. In this vein, one of the most important aspects to bear in mind is that social impact needs to be measured by a combination of ethnographic, documentary and participatory strategies. All these democratic and knowledge co-creation actions entail a financial and time cost. In current urban policies, participation is highly relevant and in some cases it is deemed to be imperative, although it is not an indicator we can consider in a unitary manner (Sánchez Carretero et al. [eds] 2019). This reflection seeks to delve into the **diversity of indicators that can be taken into account when measuring the "social success" of a project**, although with the awareness that many of these studies will need to be repeated over time after the project has been completed, allocating time and resources.

1.1. Social impact in the urban environment

Some of the EU projects on topics concerning society and community deal with indicators related to Cultural Heritage (CH). **This study attempts to summarise current trends and, in turn, create a framework that can be integrated into the "management toolbox" for citizens, academics and stakeholders we are proposing from the perspective of the Deep Cities project** (WP4). In addition, in May 2021, we organised a workshop on "Social Impact in Cultural Heritage Projects" (Figure 1.) to compile and compare statements from different academic, business and political experts. This activity, organised by the University of Barcelona in a pandemic virtual scenario, led us to reflect on the different ways in which several stakeholders approach the act of measuring their objectives and scopes.

The workshop was titled "Peripheral heritages: dissecting the social impact of heritage research projects in the urban environment". The main question debated in the workshop was "How to work on improving society-institution dialogues in the planning stages of cultural heritage projects in order to generate more realistic impact results". This question was accompanied by several premises that invited further reflection:

- Access to economic resources for culture is channelled through projects devised by experts.
- In most cases, these projects are **organised through cultural facilities (including cultural centres, schools or neighbourhood associations) with members from different institutions**: academic spheres, administrations, businesses.
- These projects usually require collaboration and/or participation with social local entities that can be charged with materialising a "social impact", a shift, an **improvement or transformation in their societal reality**. But what has been their approach to this diagnosis, how are the primary recipients known beforehand?
- These projects are **embedded in mostly top-down discourses**; this is due to certain factors, e.g. access routes to subsidies.
- Community-society-inhabitants finally become **agents that in most cases receive a product manufactured by an expert** who considers that, in the long or short term, it will generate a social or economic benefit: social cohesion, cultural capital, identities, attachment, feelings of belonging.

Social impact studies can improve the purpose of our actions and build joint working spaces for all local stakeholders at all levels.

Figure 1: Social impact virtual workshop poster.

Professionals exchanged their experiences at this meeting, indicating that there is no consensus when it comes to establishing the guidelines to follow when measuring social impact. Funding is not always available to carry out these studies. Furthermore, there are many publications on how to measure these impacts, but there is not always a consensus on the criteria to be followed.

This document is **structured in three main sections**: an analysis of other indicator's trends; a specific proposal for the evaluation of the Curbatheri-Deep Cities Project that can be extrapolated to other urban heritage scenarios; and a discussion and theoretical conclusions section. We have also added a repository of publications on social impact in cultural heritage projects, focusing on the urban environment.

2. Benchmarking: measuring impact in cultural and heritage projects

To focus on dissecting the social impact on culture, we need to reflect on what we mean by impact: are we thinking in terms of the number of people affected or, perhaps, the intensity of our actions? How to measure our results? How to combine quantitative and qualitative data?

In this section we will analyse documents from several backgrounds related to the analysis of indicators and their aims and scope. We will go through the document "*Culture 2030 Indicators"* (UNESCO 2019), the "*Europeana Impact Playbook*", the EU "*SoPHIA"* project*, the EU "HERIWELL" project and the principles of SROI (Social Return on Investment) fostered by the National Heritage Lottery Fund (NHLF). Naturally, there are other forums and several projects and places where this comparison can be continued, but we have found examples that are close to our location and have a certain impact on the countries that are part of this project.

2.1. Culture 2030 / Indicators

We open this section with a review of the recent UNESCO text on culture indicators for the 2030 agenda (2019). Citing the document titled "Culture 2030 Indicators", the intention of this study is to provide "***a framework of thematic indicators whose purpose is to measure and monitor the progress of culture's enabling contribution to the national and local implementation of the goals and targets of the 2030 Agenda for Sustainable Development**. The framework will assess both the role of culture as a sector of activity and the transversal contribution of culture across different SDGs and policy areas*" (2019, 16). It aims to:

- Give visibility to culture's contribution to sustainable development.
- Provide a thematic and transversal overview of the role of culture across the SDGs.
- Strengthen advocacy for culture.
- Provide evidence-based results to inform policies and actions.
- Build a knowledge base for action.
- Monitor global progress of culture and development for the SDGs.

These indicators were devised with a certain desire for transversality and *"Given that the role, impact, and contribution of culture are often not readily quantifiable, the indicators framework seeks to quantify behaviour and actions generated by culture and, alternatively, to document ways in which*

cultural values are enshrined in policies, programmes, and actions" (UNESCO 2019, 16). They are framed after a strategy through workshops with different experts and surveys. **The project has configured 22 indicators divided into 4 thematic dimensions related to the 2030 SDGs: Environment and Resilience, Prosperity and Livelihood, Knowledge and Skills and Inclusion and Participation**.

Figure. 2. Summary chart for "Culture 2030 Indicators" (UNESCO 2019).

The Culture 2030 Indicators methodologies rely primarily on existing data sources and those in the previous publication "The Culture for Development Indicators" (UNESCO 2014). This document seeks to bring together a **variety of reflections and methods based on data sources, including different ministries, observatories, public agencies, culture information systems, specific barometers, specific national and regional surveys, and professional volunteer organisations** (Fig 3). In fact, the first phase of this project timeline is "taking stock of existing methods" (UNESCO 2019, 22).

Related to **Heritage Value** (that in this document could be related to Cultural Value), in the third section devoted to "Knowledge and Skills" we can read that *"The proposed indicators will assess the level of commitment of public authorities and institutions in integrating and leveraging cultural knowledge to foster respect and appreciation of cultural diversity, understanding of sustainable development and transmission of cultural values, as well as in prioritising cultural training (including advanced training in heritage conservation) and promote skills and competence in creative fields"* (UNESCO 2019, 96). The text emphasises that cultural values and diversity are conducive to sustainable development.

In the fourth thematic dimension, titled "Inclusion and Participation", we can read that it *"provides a framework for assessing the contribution of culture in building social cohesion, as well as in fostering inclusion and participation"* (UNESCO 2019, 79). This section is where the issue of social cohesion is addressed and, citing the publication, *"the capacity of culture to stimulate effective engagement of local communities in public life"* (UNESCO 2019,79). These indicators **would be those that could be more closely related to social impact indicators for projects linked to heritage transformations**. We

will stress the descriptions of Culture for Social Cohesion (18), Access to Culture (20), Cultural Participation (21) and Participatory Processes (22).

The document also includes advice on how to include the **gender dimension** in several indicators, some of the markers being:

- Gender ratio
- The presence of women in leadership
- Plans and policies embracing the particular interests of women (in my view this does not take into account non-binary or gender non-conforming people)
- Analyses of gender-based budgeting or gender accounting
- Gender-specific patterns of cultural spending

The principal data types are quantitative and qualitative and sources may vary depending on the indicator (UNESCO 2019, 28-29), although those belong to the institutional sphere (Figure 3). In addition, this proposal was made after conducting a survey that is accessible online[2].

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Figure 3. Principal data sources (UNESCO 2019, 29).

In the following paragraphs some of the indicators that can be most closely related to social impact will be reviewed. These will be linked to the proposed indicator categories: economic (ECO), organisational (ORG) and societal (SOC) (related also to CSOs - Civil Society Organisations); added in brackets is the number of the indicator in the original document. In general, we find a common methodological pattern with different checklists.

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[2]https://whc.unesco.org/en/culture2030indicators/#:~:text=The%20UNESCO%20Thematic%20Indicators%20for,the%202030%0%20Agenda%20for%20Sustainable
 [accessed 23/03/2022].

- **1. Expenditure on heritage (1)**. ECO. *This indicator illustrates how financial action by public authorities to protect and safeguard cultural and natural heritage, on the local, national and international levels, alone or in partnership with civil society organisations (CSO) and the private sector, has a direct impact on safeguarding heritage and on making cities and human settlements more sustainable* (UNESCO 2019, 36). This proposed indicator (that can measure public and private monetary investment) is challenging on an international level, but could be extrapolated to local governments, e.g. if we work by scales, so it can be a useful indicator(s) for social impact in urban transformations.

- **2. Sustainable management of heritage (2)**. ORG. *This indicator offers a general picture of the strengths and shortcomings of public action to protect and promote heritage sustainability through the analysis of three components: national and international registers and inventories; action to protect, safeguard and manage heritage involving all stakeholders and fostering sustainability; the level of support mobilised to safeguard and revitalise heritage* (UNESCO 2019, 37).

  The checklist related to this indicator is very useful for the Deep Cities project when configuring indicators of the social impact of public policies in our case studies (UNESCO 2019, 38-41). One of the questions for measurement that arises is the "*evidence of involvement of local communities*" and their role in compiling, creating and managing lists of potential sites (UNESCO 2019, 41).

- **3. Cultural Facilities (4)**. CSO, SOC. *This indicator aims to assess the diversity of cultural facilities and their distribution with a territorial approach. It enables the identification of cultural areas in relation to the population, transport, administration, and economic centres* (UNESCO 2019, 46).

  The **Access to Culture** indicator. This indicator uses a "spatial analysis" method based on four main factors: **diversity** (the range of different types of facilities in the city, district, neighbourhood, etc.); **capacity** (of those facilities); **area** (the overall area of a building and/or space devoted to cultural facilities); and **network analysis** (related to the use of the facilities by communities e.g. transport routes).

  Some insights on how to address the "gender dimension", i.e. the gender ratio in management positions and visitors, are also suggested. However, given that women and men have different cultural interests, a distinction could be made in the facilities they visit.

  This can be found in the table with the legend: "Concordance of indicators in cultural facilities".

Facility	Indicator reference numbers			
	No. of institutions	Economic output	Public finance	Number of visitors/users
Library				
Museum				
Gallery				
Performance venues				

Cinema				
Traditional cultural space				
Creative hubs				
Educational institutions				
Cultural internet sites				

- **4. Open Space for Culture (5)** CSO, SOC. This is defined as an urban level indicator related to SDG 11. It is also intended to measure the degree of public use of a place. In this respect, it mentions what is understood here as a cultural activity, including a) formal and informal cultural meetings of various ethnic or other minority groups; b) festivals, including domestic workers, music concerts, open air theatre and celebrations of national and local festivities; c) markets (including those of rural communities); d) places with formal structures for performance; and e) heritage activities including landscape.

  It can be argued that "open space" could have several meanings and, moreover, that there are so many types of cultural event; in those cases, the UNESCO FCS (Framework for Cultural Statistics 2009) could be used. In the end, participation in cultural activities is related to improved emotional and physical health, community cohesion and social capital. Therefore, the main indicators here will be the type of performance, visitor profile and number of visitors; as well as, in a gender perspective, a check on the safety of the place and an analysis of whether women and men are equally involved in the event.

- **6. Cultural employment** (7). ECO, ORG. This is the "*Number of people employed in the cultural and creative sectors and cultural occupations as a percentage of overall employment for the latest year*" and "*This indicator aims to assess the role of culture as an "employer" at the national and local level, as well as the vitality and dynamism of the culture sector and its potential in improving the material welfare of those employed in it*" (UNESCO 2019, 54). These could be divided into cultural and non-cultural occupations and cultural and non-cultural establishments.

- **7. Public finance for culture (11).** ECO, ORG. This is the "*Proportion of public expenditure devoted to cultural and creative activities and the annual public budget and expenditure for the cultural and creative sectors*" and "*This indicator aims to monitor the amount of actual public spending on cultural and creative activities*". (UNESCO 2019, 59). This indicator is hard to measure due to the rechannelling of money for different uses, as the funds could be counted twice at an administrative level and because national accounting frameworks do not clearly separate cultural and other activities.

  Public expenditure here is analysed by administrative unit, type of public expenditure, amount per inhabitant, sector of intervention and source. Public budgets for culture are analysed from all of the aforementioned perspectives and by source of funding: donation, central government, allocations and local taxes. "*It is important to note that public spending on culture may include much more than direct support to the 'sector'. It might, for example, include payments to NGOs or individual artists, grants to local communities or publicity and advertising of public cultural events*" (UNESCO 2019, 60).

- **8. Governance of Culture (12).** SOC, CSO. This indicator offers an extended checklist of the governance framework supporting culture and creativity; "*This indicator aims to assess the regulation of the culture sector and to promote better working and trade conditions for better livelihoods*" (UNESCO 2019, 61). The checklist is divided into several levels, categories and domains of culture (UNESCO 2019, 64-67). The selected domains are: heritage, performance, visual arts, books and press, audio-visual, creative services, tourism and sports and recreation.

  On an urban level, some of the indicators are:

  - Measures to support job creation
  - Measure to encourage the formalisation and growth of micro-, small and medium-sized cultural enterprises
  - Regulating public assistance and subsidies for the cultural sector
  - Taking specific measures to deal with the tax status of culture
  - Evidence of policies and measures that support the balances of the international flow of cultural goods and services
  - Examples of cultural patronage, sponsorship or public-private partnerships
  - Evidence of legislation governing non-profit cultural bodies

  There are two more categories on the checklist: "Broadening participation in cultural governance" and "Media diversity and digital environment" that endorse the following indicators:

  For participation:

  - Evidence of policies that promote a gender-balanced contribution and participation.
  - Existence of participation in policy formation by culture sector professionals, local communities, disadvantaged groups.
  - Evidence that a number of cultural responsibilities are decentralised to a) regional, b) provincial c) local and municipal authorities.
  - Evidence of the use of programmes and measures to advocate and raise public awareness of culture's contribution to wellbeing and sustainable development
  - Evidence of the use of destination management organisation(s) to manage the impact of tourism on cultural values.
  - Having delivered a cooperation programme with at least one country in the last three years.

  For media:

  - Policies and measures to support media diversity, e.g. linguistic diversity
  - Evidence of public service media with a cultural mandate
  - Evidence of the digital transformation of cultural industries

- **9. Cultural Knowledge (14)**. SOC. A checklist is also proposed for this indicator: "*This indicator aims to assess the way in which cultural knowledge enhances sustainable development practices*" (UNESCO 2019, 70) and is mainly focused on intangible heritage and youth and child targets.

The checklist is divided into four sections: intangible cultural heritage for sustainable development; diversity in the curriculum for heritage; capacity building programmes and; mechanisms and education and awareness raising. Some of the main questions are related to the use and knowledge of international UNESCO Conventions:

- Training and education in subjects related to sustainability and cultural and natural intangible heritage conservation.
- Training in relevant disciplines related to intangible cultural heritage protection.
- Evidence of educational programmes on the protection of natural and cultural spaces and places of memory.
- Evidence of teacher training programmes that include approaches to intangible cultural heritage.
- Evidence of capacity-building training programmes (targeting women as a gender equity measure) to increase the expertise of heritage management staff, focusing on: armed conflict, illicit trafficking, and the safeguarding and transmission of intangible cultural heritage.
- Evidence of heritage education programmes for children and youth that contribute to improving the understanding of heritage and promoting and fostering intercultural dialogue.
- Evidence of regular training and mentoring opportunities organised or supported by public authorities (in the last 5 years) to build skills in communication, advocacy and fundraising to promote the diversity of cultural expression.
- Evidence and the number of cultural training scholarships supported by public authorities or private institutions.

- **10-12. Multilingual Education (15), Cultural and Artistic Education (16**) and **Cultural Training (17)**. SOC, ORG. These three indicators are related mainly to the educational curricula in primary and secondary education, as well as in post-secondary education (in the case of cultural training).

- **13. Culture for social cohesion (18).** SOC, CSO. This seeks to measure whether social cohesion and its achievement is part of our daily agenda. This *general* indicator is an aggregate of three others: intercultural tolerance (race, religion, migration), interpersonal trust (trust[3] and distrust), perception of gender equality (e.g. leadership ability). Citing the text "*This indicator aims to assess the degree of inter-cultural understanding, to measure the degree of personal acceptance of people from other cultures and to measure the gaps between women and men in respect to their opportunities and rights to take part in the cultural, social, economic and political life of their country*" (UNESCO 2019, 80). The proposed method for this indicator is mainly based on national data sources, as well as data provided by the World Values Survey (WVS)[4].

- **14. Access to Culture (20)**. SOC, ORG, CSO. "*This indicator aims to assess the degree to which different people have access to cultural facilities*" (UNESCO 2019, 86). It is related to the Cultural Facilities indicator (4) and "*aims to assess the overall availability and use of cultural facilities in relation to the population that might be expected to use them*" (UNESCO 2019, 86).

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[3] OECD. (2017). *OECD Guidelines on Measuring Trust*. https://doi.org/10.1787/9789264278219-en [accessed 20/03/2022].
[4] https://www.worldvaluessurvey.org/WVSContents.jsp. [Accessed 20/03/2022]. In an EU frame we can find the project EVALUE (European Values in Education) see: https://www.atlasofeuropeanvalues.eu/.

It is not about the size or capacity of a venue and is hard to interpret due to the nature of the spaces (libraries, museum, theatres, etc.) and the products or services they offer; this indicator would be related to the percentage of residents who, for example, use their cultural facilities. Cultural infrastructure is a source of cultural, social and economic vitality and its non-existence creates several difficulties in establishing viable cultural venues.

- **15. Cultural Participation (21)**. SOC. ORG. CSO. This indicator is divided into 3 sub-indicators: cultural site visits (trends in the number of visits), cultural attendance (% of the population that has participated at least once in a going-out cultural activity in 12 months), individual cultural activities (% of households reporting practicing cultural activities at home in the last 12 months). This indicator is used to assess number of visits, ascertaining which trends are increasing or declining. It also serves to assess the proportion of the population that attends cultural events (with some issues such as counting one user who goes to the cinema 4 times a month), or how many people engage in cultural activities (outdoors and indoors). This can also be used to monitor the role of cultural activities online.

The data sources proposed to measure this indicator are the Eurobarometer[5], Eurostats, Latinobarómetro[6] and national and local sources. Relevant reflections about the limits, nature and interpretation of data can be found in the descriptions of each sub-indicator (UNESCO 2019, 88-90). It is also highlighted that cities should consider carrying out their own cultural participation surveys.

- **16. Participatory Processes (22)**. SOC. ORG. CSO. "*This indicator aims to assess the opportunities open to civil society – and to cultural sector professionals and minorities in particular – to participate in the formulation and implementation of cultural activities as well as policies, measures and programmes that concern them, both nationally and at the regional/municipal/local level*" (UNESCO 2019, 92). It is related to Indicator 12: Governance of Culture. Its proposed data sources are national and local.

Checklist for Participatory Management and Governance> Participation in heritage management and governance systems (UNESCO 2019, 92).

- Evidence of active community participation in cultural policies for tangible and intangible heritage and safeguarding.
- Evidence of community involvement in the decision-making process of identifying and registering tangible heritage elements.
- Evidence of community-led processes during the inventorying of intangible heritage elements.
- Number of heritage properties with a management plan including a formalised framework for community participation.
- Number of training programmes targeted at communities, groups and individuals (in the last year).
- Evidence of policies and measures that support the media diversity by encouraging community programming for marginalised groups (indigenous peoples, migrants and refugees).

[5] https://europa.eu/eurobarometer/screen/home [accessed 23/03/2022].
[6] https://www.latinobarometro.org/lat.jsp [accessed 23/03/2022].

- Evidence that local communities undertake scientific, technical and cultural studies on ICH.
- Specific measures to promote the participation of minorities and/or indigenous groups in cultural life.
- Policies and measures promoting the diversity of cultural expressions drawn up in consultation with CSOs (last 5 years).
- Actual expenditure by Civil Social Organisations to promote the diversity of cultural expressions.

The phases in which "the public" or communities can participate and enter into dialogue with the rest of the stakeholders are policy formulation, management, implementation, monitoring and evaluation.

This is the last indicator in the document that ends with a section on **"Conclusions and Recommendations"**. The sections begin by reminding us of the purpose of those indicators: "*thematic indicators can serve to improve policy-making in the field of culture and other sectors of public policy, and promote the need to widen the range of actors that should be engaged to achieve long-lasting and sustainable development.*" (UNESCO 2019, 94). Recommendations can be found on pages 95-98 and are related to the different indicators. Recommendation Four refers to inclusion and participation and enhances a need to "*Evaluate the capacity of culture to foster participation, inclusion and social cohesion through the assessment of inclusive access to cultural facilities, the right to participate in and practice cultural expressions, and the provision of an environment that nurtures and enables, artistic freedom, and cultural diversity*" (UNESCO 2019, 98). Recommendation 4.5. based on this statement notes the relevance of assessing "*…the opportunities open to civil society and to cultural sector professionals to participate in decision-making processes related to cultural activities including the development of policies, measures and programmes that concern them, both nationally and at the local level*" (UNESCO 2019, 98).

In all cases, the need to establish true cooperation networks between the different local actors and stakeholders is highlighted, mentioning that those actions promote social cohesion, cultural understanding and a safer society. Only time will tell whether these indicators are in use or whether they are merely an indicative publication.

2.2. SoPHIA

SoPHIA was a recent EU project[7] (it ended in December 2021) the focus of which was the creation of a platform of stakeholders. Its acronym stands for Social Platform for Holistic Impact Heritage Assessment (see Fig.4) and its aim was *"to promote collective reflection within the cultural and political sector in Europe on the impact assessment and quality of interventions in the European historical environment and cultural heritage at urban level"*. It was divided into four analytical dimensions: *social, cultural, economic and environmental impact*.

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[7] Link: https://sophiaplatform.eu/en/project-description [accessed 23/03/2022].

Figure 4: SoPHIA project logo

Its deliverable D2.3, titled *"Final version of the SoPHIA Impact Assessment Model" (*SoPHIA Project -
EDUCULT 2021a), mentions that the methods applied were conducted through a three axis approach
based on: domains, people and time (see Fig. 5).

Fig.5. Three main axes of the project (SoPHIA Project -EDUCULT 2021, 9).

The novelty of the proposal highlights that, instead of focusing on the use of indicators, this method
relied on conducting a research analysis of six domains related to heritage management: 1) Social
capital and governance, 2) Identity of place, 3) Quality of life, 4) Education creativity and innovation,
5) Work and prosperity, and 6) Protection (see Fig. 6).
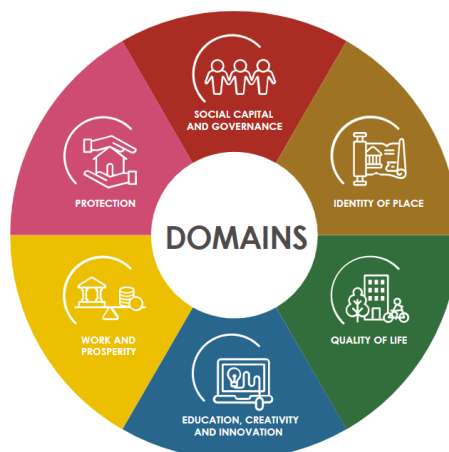
The Toolkit with further information and detailed steps will be available soon.

Fig.6. Six main domains in SoPHIA. Source: website.

With regard to the time axis, the life cycle of a project was divided into three key moments: **before the intervention, after the intervention and during the intervention**; assuming that in "in each key moment specific assessment objectives lead the process and different people are involved" (SoPHIA Project-EDUCULT 2021a, 10). Those are divided into sub-themes (Fig.7):
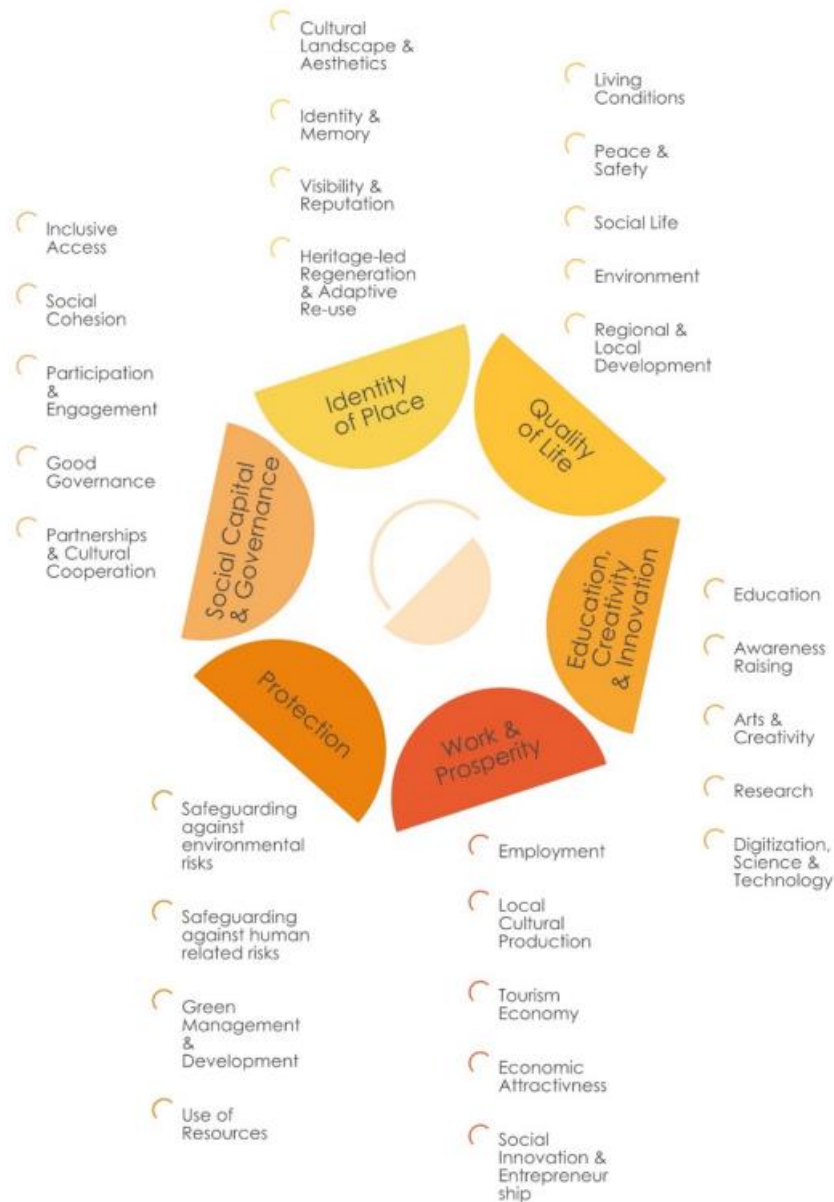
Fig.7. Main SoPHIA sub-themes (SoPHIA Project -EDUCULT 2021, 15).

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The holistic assessment that SoPHIA proposes is tailored and is summarised in this chart (Fig. 8):
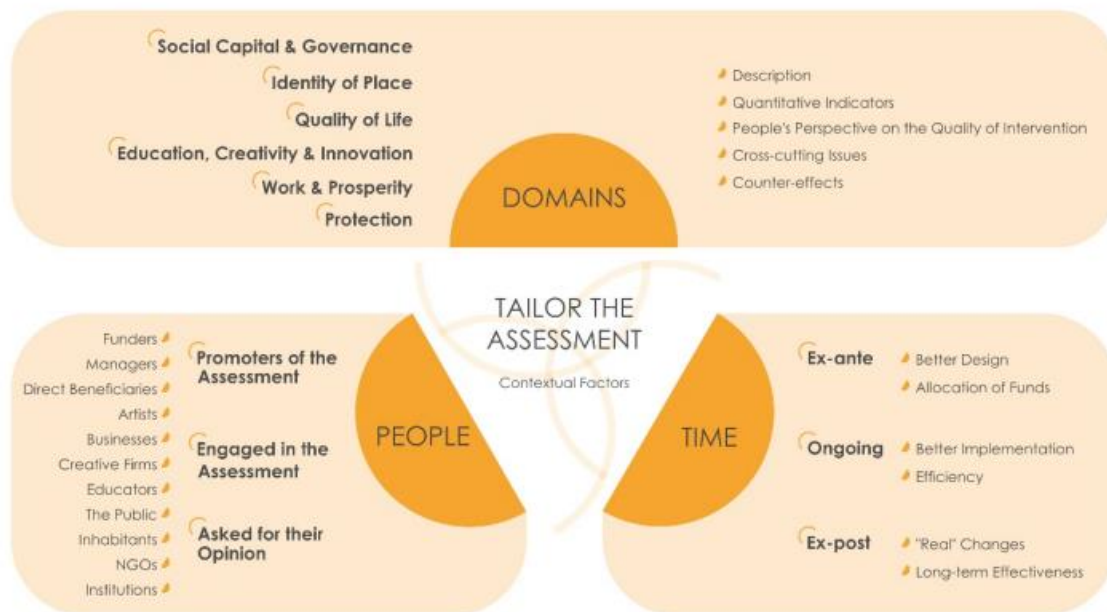
Fig.8. SoPHIA assessment schema.

In our opinion, this is a very solid and innovative proposal, which brings dynamism and realism to the way we approach cultural projects. It is interesting to see the perspective on the use of impact indicators and how it describes the need to apply them in different contexts (and at different times), as well as to combine them with other methods. In this document it is also pointed out that "*…cultural heritage interventions should be multi-domain (holistic), inclusive (for diverse stakeholders), and generative*" (SoPHIA Project-EDUCULT 2021, 5). The term "generative", which is related to impact, in this study means that "*Cultural heritage interventions should **produce impacts over time, and ensure, on the one hand the transmission of a shared definition of "heritage" and, on the other, the dynamism that derives from the active participation of people**. A longitudinal approach of the assessment allows us to explore this aspect*" (SoPHIA Project -EDUCULT 2021a, 5).

Citing the document again: "*The innovative approach proposed by SoPHIA starts from **the analysis of the complexity, intersectionality, and multidimensionality of the impacts**. In fact, SoPHIA presents a multi-dimensional set of topics to be assessed, rather than (just) a "list of measures" to assess the intervention. Hence, **"indicators"** as well as "the people's perceptions on the quality of interventions" are reported in the model, but **they do not play a central role as in traditional assessment processes**. As a matter of fact, they **are instruments to address the assessment of the key issues and their countereffects and cross-cutting aspects**.*" (SoPHIA Project -EDUCULT 2021a, 5). As the authors mention, those changes will have a positive impact on policy-makers (improving funding criteria), managers and practitioners (enabling the planning of expected impacts and the monitoring of the results achieved in a consistent an efficient manner, adjusting interventions), institutional observers and independent researchers (adding a longitudinal perspective).

Returning to our study on indicators for social impact, we have selected a few of the SoPHIA indicator examples (it should be pointed out that the proposal does not refer to them as indicators but as sub-themes). They are summarised in a table based on their proximity to the scope of this deliverable to social impact indicators (Table 2).

The analysis is structured in five categories: description, quantitative indicators, people's perspective of the quality of the intervention, cross-cutting issues, and counter effects. In our view, **very interesting in SoPHIA's proposals are the "people's perspective" questions**. We encourage the reader to review these as they could be very helpful in creating more dynamic indicators for cultural projects. Along these lines, we will indicate some of the sub-themes related to the domains of social capital and governance, identity of place and quality of life (SoPHIA Project - EDUCULT 2021a, 17-56). Citing the document for the domain's description:

a) **Social capital and governance:** "Cultural heritage sites and institutions play a role in the creation of identity and feeling of cohesion. They may function as community hubs – spaces where trust is built, and social networks are created, and they may help generate or enhance feelings of pride among the local community and develop intra-generational links. Thus, their ideas on how to build social capital include volunteering, creating and participating in events and programmes at local heritage institutions; visiting historic sites (walking tours); initiating heritage-related community actions for public good; or learning about immaterial local traditions and crafts through participation in classes, workshops and local folk festivals" (SoPHIA Project - EDUCULT 2021a, 16).

b) **Identity of place**: "...Identity of Place emphasises the importance of cultural heritage in defining and constructing identity and belonging. In a cultural anthropological tradition, it refers to the role of cultural heritage in the construction of imagined communities[11] and as part of invented national traditions… From this perspective, the narratives built around cultural heritage are central in order to understand which aspects of cultural heritage are emphasised, and by whom, and which aspects are potentially overseen" (SoPHIA Project - EDUCULT 2021a, 23).

c) **Quality of life**: "Cultural heritage plays an important role in the quality of life of groups as well as of individuals living in the urban environment. On a basic level an intervention can improve quality of life by providing employment either directly or indirectly. More significantly, heritage can provide opportunities for social connections. It gives meaning to the natural and built environment, providing connections to our past and our ancestors..." (SoPHIA Project - EDUCULT 2021a, 29).

The description and quantitative indicators for each sub-theme can be seen below (Table 2.):

Subtheme	Description	Quantitative indicators
Inclusive access	The aim is to assess the accessibility of cultural heritage resources to all groups of society.	Number of Visitors[8]
Participation and engagement	The aim is to assess the level of participation in cultural heritage.	1) Number of people/groups involved as participants and volunteers. 2) Number of associations and NGOs involved at site/practice.
Social cohesion	The aim is to assess whether the gap between different societal groups and stakeholders is bridged.	1) Ratio of participants of the intervention and number of regional 2) national and transnational collaborations and projects.
Partnership and cultural cohesion	The aim is to assess the quantity and quality of alliances and collaborations in the heritage and cultural sector, across disciplines and/or policy areas.	1) Identity of place: visibility and reputation. 2) Quality of life: peace and safety.

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[8] For all the indicators we can read "*before and after the intervention in 5, 10, 20 years) in terms of age, gender, educational level, income, citizenship and spoken languages, visible and non-visible disabilities, and social marginalisation*".

Good governance	The aim is to assess good governance and participation processes in the intervention.	1) Number of people/groups directly involved in decision-making concerning the intervention 2) Number of documents/resources made available to the public.
Identity and memory	The aim is to assess the acknowledgement and appreciation of different contemporary, potentially historic, symbolic and cultural meanings.	1) Number and form of actions taken to safeguard the diverse historic, cultural meaning and remembrance activities.
Visibility and reputation	The aim is to assess whether the image of intervention is balanced against diverse contemporary discourses.	1) Number of positive/critical/negative reactions/reflections in the public, social media and academic or/and specialised publications about the intervention.
Cultural landscape and aesthetics	The aim is to assess the relationship between the space designed/offered and local cultural identity.	1) Existence of professional spatial planning documents relating to the intervention. 2) Number of people/associations/stakeholders involved and consulted during spatial planning processes. 3) Number of activities related to safeguarding the aesthetic value, built form and cultural landscape.
Heritage-led regeneration & adaptive re-use	The aim is to assess the contemporary usage of cultural heritage and whether the revitalisation and creation of new social, cultural or economic activities is in accordance with the needs of local communities.	1) Number of buildings and complexes, recycled/projects for adaptive re-use according to usage of space, such as social housing, start-ups, etc. related to the intervention. 2) Amount of funds allocated to ensure sustainable adaptive re-use of buildings and assemblies related to the intervention.
Living conditions	The aim is to assess whether the cultural heritage intervention contributes positively towards living conditions for the people that live, work or stay in the surrounding neighbourhoods.	1) Numbers of people living, working and socialising in the area in terms of age, gender, educational level, income, citizenship, spoken languages, and workers' disabilities (by occupation), residents and local, national and international visitors. 2) Cost of living including the average cost of rent in the area, plus the cost of services such as waste collection, transport, heating, electricity, etc. compared to average income levels. 3) Availability of services: public and green transport, waste collection, internet access, infrastructure.
Peace and safety	The aim is to assess whether the intervention promotes and ensures peace-building, personal safety and community security.	1) Number of security incidents reported per annum. 2) Number of on-site/off-site activities on cross-cultural dialogue and conflict prevention and resolution and the total funding allocated to these activities.
Social life	The aim is to assess whether the participation of community groups and civic engagement is encouraged.	1) Number of public spaces and social interactions. 2) Number of active community groups and number of activities and outreach events.
Environment	The aim is to assess whether the intervention provides recreational opportunities while also maintaining the integrity of the intervention/heritage.	1) Number and size of green spaces, public parks with public sports and recreational facilities.
Regional and local Development	The aim is to assess whether the intervention promotes regional/local development through cultural investment.	1) Local and regional development markers 2) Demographics of inhabitants 3) Square metres of abandoned spaces reused
Education	The aim is to assess the diversity of educational offers, outreach activities and learning opportunities	1) Number of educational/outreach programmes and activities provided 2) Participants' demographics
Awareness raising	The aim is to assess whether the intervention supports sustainable development awareness-raising.	1) Number of programmes/projects related to sustainable development and the SDGs. 2) Number of educational exhibits/initiatives relating to issues of sustainable development and the SDGs.
Research	The aim is to assess whether the intervention supports broad research in relation to the intervention.	1) Number of research projects. 2) Total amount of funds allocated to intervention research.
Digitisation, science & technology	The aim is to assess the development of ICT tools for the management and interpretation of the intervention.	1) Number of innovative ICT tools used in interpretation and sustainable management. 2) Number of innovative ICT tools aimed at increasing access to intervention.
Arts and creativity	The aim is to assess whether the intervention enables creative/arts activities.	1) Number of opportunities/programmes fostering creativity. 2) Number and demographics of people: artists/creators involved.

Table 2. SoPHIA sub-themes and indicators (EDUCULT 2021, 17-46).

To sum up, what we are learning from SoPHIA is that indicators are one of the tools for measuring the social impact of a project, but that they should be placed in context, and there is a need to do undertake our work in such a way that the benefits can be perceived over time in a transparent and sustainable way. On the other hand, we learn that heritage management issues affect people and the spaces where they occur holistically, and that their scope should not be disconnected from those domains. You will find a complete review of the literature on the project website (SoPHIA Project - EDUCULT 2021b).

2.3. ESPON HERIWELL

This project emerged from the evaluation of the European Year of Cultural Heritage. To quote the website, "*Despite recent efforts to improve cultural heritage statistics by the European Commission, it is still a challenge to fully capture the significance of its impact on the economy and society*"[9]. One of the objectives of the HERIWELL project has been to determine whether "*disparities exist between societal impacts of cultural heritage for different groups of stakeholders*" (particularly as regards residents, tourists, minorities and migrants, but potentially also arts and heritage professionals). This objective has been particularly difficult to answer with the available empirical evidence, due to the absence of truly comparable data (ESPON 2021a, 2021b, 2021c).

The project was based on three main levels of analysis:

1) Global assessment that attempts to unveil the relationship between cultural heritage and societal wellbeing in a pan-European sense.
2) Local assessment that aims to further detail the analysis.
3) EU investments in cultural heritage during the years 2014-2020, understanding CH as cultural capital. This explores the recent outputs for CH at an EU level.

For all the cases they used quantitative and qualitative methodologies involving the use of available information and data, including survey data, big data, administrative data, and fieldwork (ESPON 2021a). This interesting report is based in several sources and addresses significant questions related to CH; for instance they worked with EUROSTAT[10] and OECD[11] databanks, among others.

For our study case we will focus on the indicators used in the HERIWELL project (see Table 3) to analyse three main dimensions: quality of life, social cohesion and material conditions (ESPON 2021c).

Dimension	Indicators
Quality of life	Growth in happiness and life satisfaction
	Improving contentment and eudemonic factors
	Improvements in education levels and empowerment in adult abilities, including digital skills
	Higher level of knowledge and research
	Improved environmental quality and sustainability
Societal cohesion	Enhanced community engagement, volunteering and charitable giving
	Strengthened place identity and symbolic representation
	Enhanced community awareness, civic cohesion and sense of belonging

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[9] https://wwww.espon.eu/HERIWELL [accessed 25/03/2022].
[10] https://ec.europa.eu/eurostat/en/ [accessed 01/04/2022].
[11] https://www.oecdregionalwellbeing.org/ [accessed 01/04/2022].

	Integration of inclusion and minorities, migrants and other disadvantaged groups, social inclusion, inclusive growth
	Trust
Material conditions	Territorial attractiveness and branding
	Growth in jobs and earnings
	Growth of property places and housing condition

Table 3. HERIWELL Societal Wellbeing (SWB) Indicators (ESPON 2021c, 63).

These wellbeing indicators are very much based on the idea of a sense of place or work, with broad concepts such as happiness and social cohesion. The report shows that those indicators are related to qualitative assessments and that the data have been crossed with Cultural Heritage indicators, drawing on the European Social Progress index[12] and different stakeholder groups. The project stressed the analysis in some museums (tangible) and some cultural manifestations (intangible) and cross-referenced the economic dimensions of concepts such as growth and jobs. Its proposal is very ambitious, and we encourage interested parties to read the detailed reports.

2.4. Europeana Pro Impact Playbook

Since 2017, the Europeana Pro Network has organised several seminars and publications on the broad subject of "impact" on culture; this area is managed by the Europeana Foundation based in the Netherlands. The network aims to provide cultural heritage enthusiasts, professionals, teachers and researchers with digital access to European cultural heritage material to inspire and inform new perspectives[13]. **They have been working on a method for practitioners to design, assess, measure and narrate impact[14]** (the four phases of the method). Those paths have been conceptualised through collaborative tools, workshops and case studies in different countries. To quote their creators, "*We need to think holistically about impact.*"[15].

In the second phase of the method "Asses your impact" we find indications of how to develop our indicators and how to do this involving external knowledge in the team (Europeana Foundation 2020). In this document it is possible to find instructions about what an indicator is and, for example, which to choose for assessing impact. Some **examples of questions** are *"What are you trying to achieve and learn and for what purpose?"*, *"Are you measuring impact to demonstrate efficacy or to report to an external funder?"* or *"Are you interested in using data to improve your work?"* (Europeana Foundation 2020, 11).

It also suggests a distinction be made between 1) the **objective** (representing facts) and 2) the **subjective** (representing opinions and perceptions); those should be balanced when designing an impact assessment. The method informs about some examples of indicators and relies on the SMART goals concept: **Specific**: it is clear what change the indicator represents; **Measurable**: it can be counted or observed (i.e. it is measurable); **Achievable**: there is a link between your activities and the outcome; **Realistic/Relevant**: the information can be collected with the resource you have and/or is relevant; **Timely:** you can collect it when you need it and at an appropriate time. What we find very interesting

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[12] https://ec.europa.eu/regional_policy/en/information/maps/social_progress/ [accessesd 10/05/2022].

[13] https://www.europeana.eu/en/about-us [access 25/03/2022].

[14] https://pro.europeana.eu/page/europeana-impact-playbook [access 25/03/2022].

[15] https://pro.europeana.eu/post/understanding-europeana-s-impact-introducing-our-impact-assessment-reports [accessesd 25/03/2022].

in this methodological proposal is that once the indicators are chosen, it is suggested to establish a **list of priorities**. The next phase would be related to the **data to be collected and which method to follow** for each of them (see Figure. 9).

Fig.9. Data collection planning from Europeana

The manual continues with advice on different ethnographic methods, such as those carried out in Work Package 3 of our project, and how to analyse, evaluate and draw conclusions. We agree with the creators of this method that one of the most relevant phases will be to do share our conclusions with a wider audience, citing the document *"…the people or organisations who are the principal audience for this impact assessment. Help them understand the research you have undertaken and how this demonstrates the impact you have had"* (Europeana Foundation 2020, 38). **However, the main shift we want to explore in the Deep Cities project is how to involve the communities of interest in the process of analysis and conclusions, and not just share the results with them.**

2.5. National Heritage Lottery Fund

The [National Heritage Lottery Fund](#) (in the past Heritage Lottery Fund) is one of the most important institutions in the UK for financing heritage projects with a social focus. In addition, **each project must carry out a self-evaluation process usually consisting of a logic model based on inputs, outputs and outcomes (they remark that counting with baseline data is also relevant). Those reports allow the NHLF to learn through monitoring, evidencing, validating, improving, researching, and advocating**. This organisation has a long tradition of evaluating projects and their own actions and strategies. Moreover, on their website you can find reports on internal social impact.

The NHLF proposes an evaluation model based on **three key areas** of "outcomes" (see the colours in Table 3): **heritage** (blue), **people** (green) and **communities** (orange). There are 9 outcomes in total. To measure the outcomes, they propose a series of objective indicators. These outcomes are related to three main areas: economic (e.g. household income), quality of life (e.g. life expectancy or educational attainment) and environment (e.g. air pollution and water quality). In the report, outcomes are considered "… *changes, impacts or benefits that happen as a direct result of your project*"[16].

Those outcomes should be measured in the short and long term and, to deal with a better evaluation process, it is also recommended to analyse external factors; elements that will impact on the project's achievements. Along these lines we can find some examples of indicators linked to the aforementioned heritage-related outcome (Table 4):

Outcomes	Some indicators/suggested methods
Heritage will be in **better condition**	• Achievements towards professional/heritage specialist standards

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[16] https://www.heritagefund.org.uk/funding/outcomes [accessed 23/03/2022].

Heritage will be **identified** and **better explained**	• Data on the volume of heritage that has been identified/recorded • Data on the gaps that this may have filled in an existing collection/data set • Quality of data. • Feedback from visitors and users about: the new resources, their ease of use, quality of information, impact on understanding, for example, learning new facts or information, making sense of something new, gaining a better or deeper understanding, linking areas that had not been previously linked.
People will have **developed skills**	• Staff, volunteers and participants will be able to demonstrate new competencies, for example, in new specific skills (e.g. project management, digital skills, etc.), increased qualification levels, etc.
People will have **learnt about heritage**, leading to change in ideas and actions	• Visitor/user reaction to the heritage topic • Visitors and users provide feedback on the new resources, e.g. their ease of use, quality of information, that impact on their understanding, e.g. learning new facts or information, making sense of something new, gaining a better or deeper understanding, linking areas that had previously been linked, creating an interest in something new. • Visitors and users will explain how they have used their new knowledge, e.g. sharing it with other people, using it in their professional or social lives, etc. • Changing the ideas of visitors/users, e.g. a different perception of the importance of biodiversity or of the contribution made by young people in the community • Changed actions – e.g. others may have started conservation work, joined the management group of a friends organisation, decided on a career in heritage or become involved in other community projects.

People's **wellbeing will be improved**	• **Objective indicators** usually measured in three main areas:
	  ▪ Economic – e.g. GDP and household income
	  ▪ Quality of life – e.g. life expectancy, crime rates, educational attainment
	  ▪ Environment – e.g. air pollution, water quality

	• **Subjective measures** ask people to assess their own wellbeing. Visitors, users, staff, stakeholders provide feedback on the time they have had, e.g. enjoyed opportunities for social interaction, liked being part of a team achieving something, enjoyed learning about heritage, enjoyed celebrating achievements. They can give feedback on expectations of experience, whether they will visit/participate again, whether they will recommend to others, whether they are inspired
A wider range of people will be **involved with heritage**	• Change in **audience profile over the course of the project** – visitor background – i.e. people from a wider range of ages, ethnicities, social backgrounds; more disabled people; or groups of people who have never engaged with heritage before.
Their **local economy** will be boosted	• Financial spend in the **local economy** • Increased footfall at the heritage site and its impact on the **locality**
The local area/community will be a **better place to live**, work or visit	• Community feedback on the impact of the **invigorated heritage site**, e.g. attracting more people, more pride in the local area, more facilities for local people
Their organisation will be **more resilient**	• Change in management focus • Change in financial outlook, new financial resources • Change in resources and expertise • More local stakeholder involvement • More partnership working • New skills
Data from: https://www.heritagefund.org.uk/funding/good-practice-guidance/evaluation-guidance#heading-4 [accessed 22/03/2022]	

Table 4. National Heritage Lottery Fund evaluation outcomes framework (NHLF).

The organisation stresses the importance of measuring the impact of each of the projects it funds, but there **is no guide to measuring impact with evaluation methods**. It is necessary to look at each of the proposed categories.

3. Mapping the social impact of the heritage value of urban transformations: Deep Cities Indicators Matrix

In general, indicators serve to corroborate outcome achievements and measure success. However, an analysis of other models has allowed us to reflect on the use of indicators, their limits, and the need to make their scope more flexible and dynamic. Projects such as SoPHIA seek to broaden this dimension comprehensively by addressing each of the phases and results they entail. In this vein, **for the Deep Cities project, we intend to work with tools that allow practitioners to involve society in the tasks of evaluating heritage projects focused on society and with a sustainable perspective**. The goal is to generate a battery of indicators that make us facilitators, rather than experts that promote a static authoritarian discourse. This matrix was conceived with the idea of being able to evaluate the results of work packages two and three from an inclusive point of view.

In this respect, this section of the dossier reflects on what could be **the indicators that help evaluate the social impact of participatory heritage-led projects,** such as the *Curbatheri-Deep Cities*. One of the goals of the project is to foster research and methods for sustainable conservation proposals. In doing so, it attempts to build bridges between the different dimensions involved: academic, institutional and societal. It must be understood that **improving participatory evaluation methods is not the sole purpose of this project** and that this matrix is designed to take advantage of our own project as a case study to revise evaluative participatory methods in heritage management. **In combination with the set of indicators we propose, it would be interesting for each working group to be aware of what diagnostic initiatives have been undertaken in their cities on a local level** (see 3.1). Local data can help us situate some of our responses, especially those that have to do with a ratio linked to the population groups targeted by our actions or the level of interest or participation in cultural activities in an area of the city.

3.1. Indicators and evaluation dimensions that appear in the matrix: towards a "proactive sense of research".

The idea is to explore ways to measure how the work undertaken in our academic projects can impact on the social fabric and citizenship. **This can take place through relationships with other agents or directly with the involved stakeholders**. Most projects nowadays go through a series of successive or diachronic phases or stages, both combined with two continuous stages that last for the whole project, leadership and transfer. These phases are closely linked to academic research constructs and do not always take social rhythms into account. **In order to apply a proactive sense of research we suggest allocating time and resources to proactively evaluating our actions and methods**. This matrix of measuring social impact towards community and stakeholders' interactions can be a tool for other researchers and people interested in developing collaborative and co-created projects and science.

The Deep Cities evaluative proposal, led by Work Package Five (University of Barcelona), focused **on three main dimensions**: the scientific/academic, the institutional and the societal, with the addition of an internal analysis dimension that serves to rectify our actions and methods.

1) **Academic.** To learn whether theoretical and methodological contributions in the scientific domain are occurring through the project.

2) **Institutional.** To analyse whether strategies to improve communications between institutional and social stakeholders are applied.

3) **Societal.** To detect whether the project promotes and strengthens the democratic and participatory processes of urban heritage.

4) **Internal.** To help reviewing collaborations between entities involved in the projects.

3.1.1. The social interaction indicators matrix for research projects

In order to measure our success regarding those dimensions, we suggested configuring an indicators matrix in order to check on different aspects that we ourselves evaluate through different levels (see Table 6.). This phase of the project helps us revise and modify the next stages of the project, making it more proactive with the social stakeholders and communities of interest. **Knowing in advance that all projects mutate as they progress, we have designed the indicators following our own project stages**. They can be very similar to those occurring in other projects in both the humanities and the pure sciences, so they could be extrapolated:

a) **Early Stage. Project Design (embryonic)**. What happens when consortia are set up and proposals are written. All the partners collaborated in this stage.

b) **Continuous phase. Project Management.** This is a phase that lasts for the whole project, it is the management phase between work teams and tasks. Those phases are led by the lead partner in this project (Norwegian Institute for Cultural Heritage Research, NIKU).

c) **Theoretical phase.** The phase associated with the literature review and the generation of theoretical references that will be linked to the rest of the project. This was led by the lead partner, the Norwegian Institute for Cultural Heritage Research (NIKU).

d) **Methodological/Laboratory.** This is where the cross-cutting research is designed, where together with the previous phase it indicates the ways in which to respond to the objectives and challenges of the project. In our project this phase has been called the laboratories: an analogy to designing experiments. This has been led by the UCL London.

e) **Developmental/Observatory.** At this stage, the working tools designed in the previous phase are put into practice. In this phase, the scope of the previously proposed methodology is analysed in order to be enhanced and improved. This was led by the University of Stirling.

f) **Interpretation and usability.** This phase is where, after a shared interpretation of results, a space is designed to make those projects' partial results accessible to a vast number of users. In our project this stage was devoted to designing a management toolbox, an instrument for stakeholders and the interested public. This was led by the University of Firenze.

g) **Evaluation.** This stage involved a continuity aspect, as it is a process that is carried out in an ongoing manner, with partial evaluations complemented by a final evaluation. Internal evaluations are conducted by the project members, but an innovative effect of the project was to consider a possible participatory evaluation in a workshop organised during the final stretch of the project. This was led by the University of Barcelona.

h) **Drafting of strategic documents.** This is the stage where the results of the project are embedded in the existing literature on a global level, but with special emphasis on the European frameworks. Recommendations and guidelines are drafted to enrich existing cultural policies, distilling the information obtained in the previous phases.

i) **Continuous stage. Dissemination.** This is an ongoing stage where work is carried out to disseminate the progress and results of the project. This was led by the lead partner, the Norwegian Institute for Cultural Heritage Research (NIKU).

For each of these phases, **we propose a series of indicators that can be extrapolated to other researchers who want to revise and adapt their proposals so that they connect with social agents in different ways**. As we will see, in many cases, the methods used to determine these indicators will be based on the number of options and the frequency of meetings with the communities and stakeholders. On other occasions surveys and interviews will be proposed, i.e. to work with ethnographic methods that allow us to understand the level of social commitment we are applying at the different stages of the project.

This is a reflective proposal based on our own experience, which can be improved over time. To us, the evaluation work package has helped to reflect on our project's social and committed involvement and to identify areas for improvement. **We are suggesting a series of comprehensive indicators** (I) **and some methods** (M) **for measuring them** (mixing qualitative QL with quantitative QT). **These indicators should be seen as dynamic entities that do not always have to be applied**, but can be combined to generate different evaluation strategies, and which can and should be combined with other evaluation techniques. Each of them needs to be analysed flexibly and their degree of implementation may also vary if rectifications occur. **One way to keep track is to review some of these indications as we plan activities or analyse them, thus making our methodologies more proactive**.

I. Design: interdisciplinarity and engagement

I.1. Interdisciplinarity and diversity in the composition of the team. Projects that involve specialists from different branches and backgrounds tend to connect more successfully with different social actors. Each city has its own policies and particularities, so the diverse origin of the members will serve to provide the project with a more open approach in terms of interactions with social structures. The less interdisciplinary a project is, the less its potential applications are likely to be.

> **M.I.1.1.** Range of disciplines involved (QL). Number of members from each discipline (QT).
> **M.I.1.2.** Analysis of the background and cultural framework of the project members (QT). Gender or non-gender ratio (QL).

I.2. Level of collaboration in local, regional and national stakeholder networks from several fields. Working with a diverse group of local associations will provide strengthened links with the social partners in the short and long term. Analysing these collaborations can avoid working with a narrow focus that impacts only certain target groups.

> **M.I.2.1.** Range of stakeholders involved (e.g. enterprises, associations) (QL). Number of members for each type (QT).
> **M.I.2.2.** Revision of the nature, scope and cultural framework of the stakeholders (QL).

II. Project Management: cooperation

I.3. Level of cooperation between project partners (academic), local stakeholders (administration, private sphere) and associations (citizen's groups) in the decision-making process. The project management should promote inclusive and intersectional dialogues with the social partners as well as engagement with the social agents by the project members. If dialogues and actions remain only at an academic level, the social impact is minimised.

> **M.I.3.1.** Frequency and nature (QL/QT) of joined events hosted in collaboration with local stakeholders.
> **M.I.3.2.** Frequency and nature of project meetings with local stakeholders (QL/QT).

I.4. Intersectional and gender perspective application. Inclusive perspectives in terms of ethnicity, class and gender are fundamental to the successful development of any project. These approaches are in line with the local government guidelines promoted by European regulations. Intersectional and intercultural approaches promote fairer and safer spaces, which results in an increase in the social impact of our proposals.

> **M.I.4.1.** Analysis of the use of inclusive and intersectional language and actions that promote gender and intercultural perspectives in all phases of the project (QL).

III. Theoretical background: multivocality

I.5. Diversity of research sources consulted for the research. A theoretical framework based on the use of diverse and not only academic sources will realistically connect to social issues and challenges. In addition, sources should be consulted that are framed by the epistemic concepts of the different case studies.

> **M.I.5.1.** Analysis and evaluation of the type, e.g. academic vs non-academic and the origin (e.g. epistemic frameworks) of the sources used (QL).

I.6. Level of integration of the involved community's perspective, discourses and narratives in the theoretical framework. Integrating the community into the theoretical phase is a challenge that can be taken up beforehand through ethnography or by conducting a survey. This is a key indicator to consider if we want to develop a theoretical framework that responds to the diversity of the social needs within the interested communities.

> **M.I.6.1.** Analysis of the background and cultural framework of the communities linked to case studies. Carry out an initial consultation (or survey) with communities of interest and stakeholders (QT, QL).
> **M.I.6.2.** Frequency and type of meetings held with stakeholders (QT, QL).

I.7. Level of knowledge-transfer and co-creation applied to the material derived from and related to the theoretical framework. It is sometimes considered that theory does not concern social actors; however, to boost community engagement it is important to co-create these frameworks and their derived actions with all communities of interest.

> **M.I.7.1.** Number and nature of co-created proposals (QT, QL).

IV. Methodology: theoretical social research commitment

I.8. Depth of the analytical method applied to the social dimension of the case studies. Research projects usually include a series of case studies. This indicator seeks to investigate how "profoundly" the social dimension has been considered in each of them.

> **M.I.8.1.** Range and number of social features included in the diagnosis of the case studies (QT, QL).
>
> **M.I.8.2.** Share the methodology and analyse the feedback received from all the communities of interest and the different stakeholders (QL).

I.9. Level of commitment in addressing issues that promote short- and long-term social wellbeing. The methodology designed for a project may try and contribute to improving social wellbeing in the short and long term. For this to take place, it is important to know where we are starting from.

> **M.I.9.1.** Conduct a baseline survey to be able to measure and analyse long-term methodological changes and improvements (QL/QT).

I.10. Level of engagement and inclusion of the communities of interest and stakeholders in the methodology decision-making process. As in the theoretical phase, it is equally important to consider how much the social partners are being included in decision-making and methodological adjustments. For this indicator to be successful, we need to consider how to analyse the level of interaction we have with communities, i.e. semi-structured or impromptu interviews.

> **M.I.10.1.** Frequency and nature of meetings with the communities of interest and stakeholders (QT, QL).
>
> **M.I.10.2.** Number and nature of the different stakeholders' methodological proposals included in the study (QT, QL).

V. Development: practical social research commitment

I.11. Level of engagement and cooperation with communities of interest and stakeholders in carrying out participatory research activities. In implementing the practical actions of our projects, we can extend them to the interested and non-interested communities. It is here that action research and participatory actions open up to society as a whole, but how do the actors who are already collaborating in the territory link up with society as a whole? This indicator helps us check whether in this phase we are working in isolation as academics or experts, or whether we are following a pattern of socialisation of our activities, making them plural and diverse.

> **M.I.11.1.** Frequency and nature of the organised workshop or research actions and activities (QT, QL).
>
> **M.I.11.2.** Number and precedence of the active participants and attendees of the organised workshops or research activities (QT/QL).
>
> **M.I.11.3.** Ability to rectify and remake activities in a more participatory manner (QL).

I.12. Level of commitment with communities of interest and stakeholders in analysing the results of the activities. This indicator is complementary to the previous one in the sense that it seeks to investigate how the academic analysis of the results engages the actors involved in the academic

research process. Not leaving social groups out of interpretative tasks is a challenge, as this has always been the case in the past. Through this indicator we can review whether there are any gaps in our approach and we can rectify the development of the project by working on its inclusiveness at each stage.

> **M.I.12.1.** Frequency and nature of the meetings for data analysis with the communities of interest and stakeholders (QL/QT).
>
> **M.I.12.2.** Number and nature of the participants of the "research outcome" analysis activity (QT/QL).
>
> **M.I.12.3.** Conduct satisfaction surveys upon completion of activities (QL).

VI. Interpretation: multi-stakeholder innovation

I.13. Level of social innovation of the tools and methods developed. This indicator reflects on the level of social innovation developed on the information exchange platform. Working with it requires prior knowledge of the current policy lines of work in terms of inclusiveness or interculturality on both a national and an international level.

> **M.I.13.1.** Comprehensive analysis of the sections that comprise the set of techniques and resources framed in the context of EU, national and local inclusive policies (QL).

I.14. Degree of engagement with the communities of interest and stakeholders in the design of the set of resources. This indicator measures the level of collaboration of communities and stakeholders in the design of the resources.

> **M.I.14.1.** Frequency and nature of the meetings with the communities of interest and stakeholders (QT/QL).
>
> **M.I.14.2.** Number and nature of the different stakeholder's proposals involved in the set of techniques proposed (QT/QL).

I.15. Level of usability, accessibility and reproducibility of the techniques and resources developed by the communities of interest and stakeholders. This is where the users' actual use of the set of tools is measured. For this purpose, auxiliary instruments, such as the design of surveys, must be used.

> **M.I.15.1.** Conduct an online survey with experts and non-experts on the usability of the resources (QL).
>
> **M.I.15.2.** Number of users, traffic and downloads from the website (QT).

VII. Evaluation: transparency

I.16. Level of commitment to engage society in the evaluation processes. This indicator seeks to ascertain to what extent society is involved in the evaluation process. On the one hand, we can work from the evaluation of results and on the other from the evaluation of the process. In turn, the frequency of the meetings and the type of participants are measured to see if they represent plural and diverse voices. Involving society in the evaluation of projects increases their transparency; the results are not only measured by an academic quorum but are contrasted with the social actors.

M.I.16.1. Frequency and nature of the evaluation meetings (development and results) with the communities of interest and stakeholders (QT/QL).

M.I.16.2. Number and nature of the participants in the organised workshops or evaluation activities (QT/QL).

I.17. Variety of channels to allow social participation in the evaluation of project outcomes and their different prior phases. The diversity and number of options for evaluating participation is a further indicator of the democratisation and shared sovereignty of our projects. In this case we can also work with surveys and their interpretation by measuring different degrees of satisfaction. These surveys may and should be carried out at different times during the project, as these projects have a dynamism that can generate different externalities and stakeholder perceptions at different stages.

M.I.17.1. Number and type of events (offline and online) designed to allow participatory evaluation opportunities for the interested communities and stakeholders (QT/QL).

M.I.17.2. Develop a survey and analysis of the project outcome, 6 months, 1 year and 3 years after the end of the project (QT/QL).

VIII. Drafting strategic documents: inclusivity

I.18. Level of commitment to the recommendations that foster the short- and long-term application and implementation of the project results. One of the ways of representing and sharing data is international impact documents such as recommendations or guidelines. In our opinion, analysing how the short- and long-term impact of a project is discussed with communities of interest is an indirect way of measuring the inclusiveness of a project. In addition, this indicator allows us to understand whether we really include stakeholders in the whole process of our projects.

M.I.18.2. Revise the number of documents prepared in collaboration with the stakeholders and communities of interest once the project has been finalised, analysing the provenance of the participants and the type of partnership developed (QT/QL).

IX. Dissemination: accessibility

I.19. Diversity of the dissemination forums and platforms chosen. In addition, this indicator allows us to understand whether we are developing inclusive practices to make our outputs accessible in several formats and within all the stages of our projects.

M.I.19.1. Use of different languages, style of language and vocabulary according to the type of audience.

M.I.19.2. Number and nature of the venues and attendees of the organised workshops or dissemination activities.

I.20. Accessibility, usability and reproducibility of the resources shared by the project. This dissemination-related indicator is linked to the effective use of the materials produced during its lifetime.

> **M.I.20.1.** Number of website users, downloads and traffic.
> **M.I.20.2.** Number and types of channel used to disseminate the outcome.
> **M.I.20.3.** Conduct a feedback survey to analyse the types of audience and user experience.

A summary chart of these indicators and methodologies can be found in the following pages.

3.1.2. Measuring the indicators

These indicators can be measured by different success criteria such as very low, low, medium, high or very high. Low levels should be associated with low frequencies or low variety of audiences, so it is recommended to work first with numbers of participants per stakeholder group.

It can be used in a model like the one shown on the next page (see Table 6).

		Indicator	Description	Punctuation 1-5	Comments and corrective actions
Design	1	**Interdisciplinarity and diversity in the composition of the team/consortium**	Projects that involve specialists from different branches and backgrounds tend to connect better with different social actors. Each city has its own policies and particularities, so the diverse origin of the members will serve to provide the project with a more open approach in terms of interactions with social structures. The less interdisciplinary a project is, the less its potential applications are likely to be.		
	2	**Level of collaboration in networks of local, regional, and national stakeholders from several fields**	Working with a diverse group of local associations will provide a strengthened link with the social partners in the short and long term. Analysing these collaborations can prevent working with a narrow focus that impacts only certain target groups.		
Management	3	**Level of cooperation between project partners (academic), local stakeholders (administration, private sphere) and associations (citizen's groups) in the decision-making process**	The project management should promote inclusive and intersectional dialogues with the social partners as well as engagement with the social agents by the project members. If dialogues and actions remain only at an academic level, the social impact is minimised.		
	4	**Intersectional and gender perspective application**	Inclusive perspectives in terms of ethnicity, class and gender are fundamental to the successful development of any project. These approaches are in line with the local government guidelines promoted by European regulations. Intersectional and intercultural approaches promote fairer and safer spaces, which result in an increase in the social impact of our proposals.		
Theoretical	5	**Diversity of sources consulted for the research**	A theoretical framework based on the use of diverse and not only academic sources will realistically connect to social issues and challenges. In addition, sources should be consulted that are framed by the epistemic concepts of the different case studies.		
	6	**Level of integration of the involved community's perspective, discourses and narratives in the theoretical framework**	Integrating the community into the theoretical phase can be a challenge that can be taken up through ethnography beforehand or by conducting a survey. This is a key indicator when considering whether we want to develop a theoretical framework that responds to the diversity of the social needs within the interested communities.		
	7	**Level of knowledge transfer and co-creation applied to the material derived from and related to the theoretical framework**	It is sometimes thought that theory does not concern social actors; however, to boost community engagement it is important to co-create these frameworks and their derived actions with all communities of interest.		
Methodological	8	**Depth of the method of analysis applied to the social dimension of the case studies**	Research projects usually include a series of case studies. This indicator seeks to investigate how "profoundly" the social dimension has been considered in each of them.		
	9	**Level of commitment in addressing issues that promote short- and long-term social wellbeing.**	The methodology designed for a project may try to contribute to improved social wellbeing in the short and long term. For this to happen, it is important to know where we are starting from.		
	10	**Level of engagement and inclusion of the communities of interest and stakeholders in the decision-making process of the methodology**	As in the theoretical phase, it is equally important to consider how much the social partners are being included in decision-making and methodological adjustments. For this indicator to be successful, we need to consider how to analyse the level of interaction we have with communities, i.e. with semi-structured or impromptu interviews		
Developmental	11	**Level of engagement and cooperation with communities of interest and stakeholders in carrying on participatory research activities**	In implementing the practical actions of our projects, we can extend them to the interested and non-interested communities. It is here that action research and participatory actions open up to society as a whole, but how do the actors who are already collaborating in the territory link up with society as a whole? This indicator helps us ascertain whether in this phase we are working in isolation as academics or experts, or whether we are following a pattern of socialisation of our activities, making them plural and diverse.		
	12	**Level of commitment with communities of interest and stakeholders in analysing the results of the activities**	This indicator is complementary to the previous one in the sense that it seeks to investigate how the academic analysis of results engages the actors involved in the academic research process. Not leaving social groups out of interpretative tasks is a challenge, as this has always been the case in the past. Through this indicator we can review whether there are any gaps in our approach and be able to rectify the development of the project by working on its inclusiveness at each stage.		
Int	13	**Level of social innovation of the tools and methods developed**	This indicator reflects on the level of social innovation developed in the information exchange platform. Working with it requires prior knowledge of the current policy lines of work in terms of inclusiveness or interculturality on both a national and an international level.		

	14	**Degree of engagement with the communities of interest and stakeholders in the design of the set of resources**	This indicator measures the level of collaboration of communities and stakeholders in the design of the resources	
	15	**Level of usability, accessibility and reproducibility of the techniques and resources developed by the communities of interest and stakeholders**	This is where the actual use of the set of tools by users is measured. For this purpose, auxiliary instruments such as the design of surveys must be carried out.	
Evaluation	16	**Level of commitment to engage society in evaluation processes.**	This indicator seeks to ascertain to what extent society is involved in the evaluation process. On the one hand, we can work from the evaluation of results and, on the other, from the evaluation of the process. In turn, the frequency of the meetings and the type of participant are measured to see if they represent plural and diverse voices. Involving society in the evaluation of projects increases their transparency; the results are not only measured by an academic quorum but are contrasted with the social actors	
	17	**Variety of channels to allow social participation in the evaluation of the project outcomes and its various different phases**	The diversity and number of options for evaluating participation is a further indicator of the democratisation and shared sovereignty of our projects. In this case we can also work with surveys and their interpretation by measuring different degrees of satisfaction. These surveys may and should be carried out at different times during the project, as the dynamism of such projects can generate different externalities and stakeholder perceptions at different stages	
Drafting	18	**Level of commitment with the recommendations that foster the short- and long-term application and implementation of the project results**	One of the ways of representing and sharing data is international impact documents, such as recommendations or guidelines. In our opinion, analysing how the short- and long-term impact of a project is discussed with communities of interest is an indirect way of measuring its inclusiveness. In addition, this indicator allows us to understand whether we really include stakeholders in the whole process of our projects	
Dissemination	19	**Diversity of the dissemination forums and platforms chosen**	In addition, this indicator allows us to understand whether we are developing inclusive practices to make our outputs accessible in several formats and within all the stages of our projects.	
	20	**Accessibility, usability and reproducibility of the resources shared by the project.**	This dissemination-related indicator is linked to the effective use of the materials produced during the lifetime of the project.	

Table 6. List of tentatve indicators and descriptions to measure the social interactions in research projects. Deep Cities 2022.

Indicators of social interactions in research projects

Legend (left column):

Academic
To ascertain whether the theoretical and methodological contributions in the scientific domain are taking place.
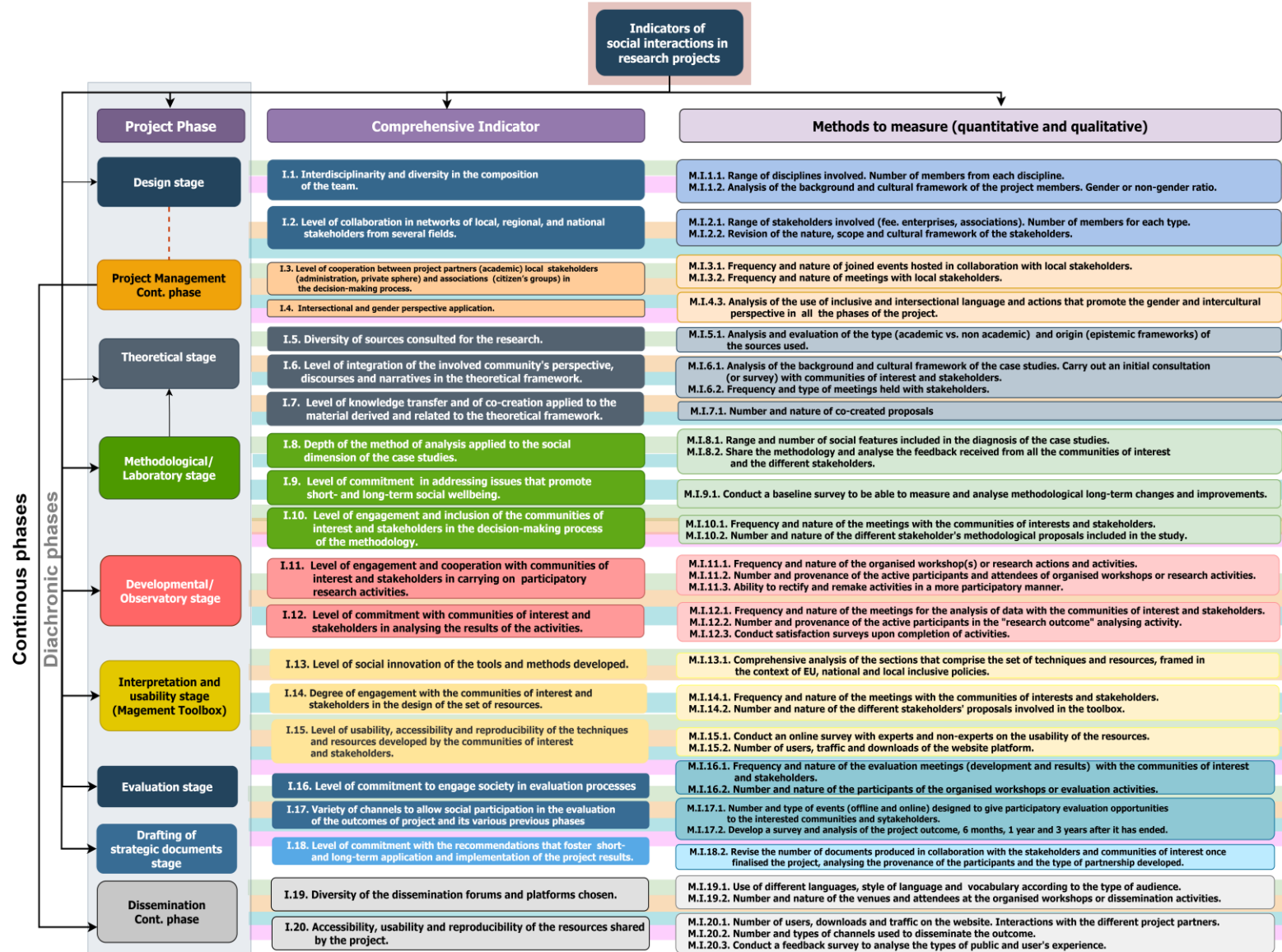
Institutional
To analyse whether the strategies to improve communications between institutional and social stakeholders are being applied..

Societal
To detect wherever the project to promote and strengthen the democratic and participatory processes of urban heritage projects is taking place..

Internal
To help review collaborations between entities involved in the projects.

Continous phases / Diachronic phases

Project Phase	Comprehensive Indicator	Methods to measure (quantitative and qualitative)
Design stage	I.1. Interdisciplinarity and diversity in the composition of the team.	M.I.1.1. Range of disciplines involved. Number of members from each discipline. M.I.1.2. Analysis of the background and cultural framework of the project members. Gender or non-gender ratio.
	I.2. Level of collaboration in networks of local, regional, and national stakeholders from several fields.	M.I.2.1. Range of stakeholders involved (fee. enterprises, associations). Number of members for each type. M.I.2.2. Revision of the nature, scope and cultural framework of the stakeholders.
Project Management Cont. phase	I.3. Level of cooperation between project partners (academic) local stakeholders (administration, private sphere) and associations (citizen's groups) in the decision-making process.	M.I.3.1. Frequency and nature of joined events hosted in collaboration with local stakeholders. M.I.3.2. Frequency and nature of meetings with local stakeholders.
	I.4. Intersectional and gender perspective application.	M.I.4.3. Analysis of the use of inclusive and intersectional language and actions that promote the gender and intercultural perspective in all the phases of the project.
Theoretical stage	I.5. Diversity of sources consulted for the research.	M.I.5.1. Analysis and evaluation of the type (academic vs. non academic) and origin (epistemic frameworks) of the sources used.
	I.6. Level of integration of the involved community's perspective, discourses and narratives in the theoretical framework.	M.I.6.1. Analysis of the background and cultural framework of the case studies. Carry out an initial consultation (or survey) with communities of interest and stakeholders. M.I.6.2. Frequency and type of meetings held with stakeholders.
	I.7. Level of knowledge transfer and of co-creation applied to the material derived and related to the theoretical framework.	M.I.7.1. Number and nature of co-created proposals
Methodological/ Laboratory stage	I.8. Depth of the method of analysis applied to the social dimension of the case studies.	M.I.8.1. Range and number of social features included in the diagnosis of the case studies. M.I.8.2. Share the methodology and analyse the feedback received from all the communities of interest and the different stakeholders.
	I.9. Level of commitment in addressing issues that promote short- and long-term social wellbeing.	M.I.9.1. Conduct a baseline survey to be able to measure and analyse methodological long-term changes and improvements.
	I.10. Level of engagement and inclusion of the communities of interest and stakeholders in the decision-making process of the methodology.	M.I.10.1. Frequency and nature of the meetings with the communities of interests and stakeholders. M.I.10.2. Number and nature of the different stakeholder's methodological proposals included in the study.
Developmental/ Observatory stage	I.11. Level of engagement and cooperation with communities of interest and stakeholders in carrying on participatory research activities.	M.I.11.1. Frequency and nature of the organised workshop(s) or research actions and activities. M.I.11.2. Number and provenance of the active participants and attendees of organised workshops or research activities. M.I.11.3. Ability to rectify and remake activities in a more participatory manner.
	I.12. Level of commitment with communities of interest and stakeholders in analysing the results of the activities.	M.I.12.1. Frequency and nature of the meetings for the analysis of data with the communities of interest and stakeholders. M.I.12.2. Number and provenance of the active participants in the "research outcome" analysing activity. M.I.12.3. Conduct satisfaction surveys upon completion of activities.
Interpretation and usability stage (Magement Toolbox)	I.13. Level of social innovation of the tools and methods developed.	M.I.13.1. Comprehensive analysis of the sections that comprise the set of techniques and resources, framed in the context of EU, national and local inclusive policies.
	I.14. Degree of engagement with the communities of interest and stakeholders in the design of the set of resources.	M.I.14.1. Frequency and nature of the meetings with the communities of interests and stakeholders. M.I.14.2. Number and nature of the different stakeholders' proposals involved in the toolbox.
	I.15. Level of usability, accessibility and reproducibility of the techniques and resources developed by the communities of interest and stakeholders.	M.I.15.1. Conduct an online survey with experts and non-experts on the usability of the resources. M.I.15.2. Number of users, traffic and downloads of the website platform.
Evaluation stage	I.16. Level of commitment to engage society in evaluation processes	M.I.16.1. Frequency and nature of the evaluation meetings (development and results) with the communities of interest and stakeholders. M.I.16.2. Number and nature of the participants of the organised workshops or evaluation activities.
	I.17. Variety of channels to allow social participation in the evaluation of the outcomes of project and its various previous phases	M.I.17.1. Number and type of events (offline and online) designed to give participatory evaluation opportunities to the interested communities and sytakeholders. M.I.17.2. Develop a survey and analysis of the project outcome, 6 months, 1 year and 3 years after it has ended.
Drafting of strategic documents stage	I.18. Level of commitment with the recommendations that foster short- and long-term application and implementation of the project results.	M.I.18.2. Revise the number of documents produced in collaboration with the stakeholders and communities of interest once finalised the project, analysing the provenance of the participants and the type of partnership developed.
Dissemination Cont. phase	I.19. Diversity of the dissemination forums and platforms chosen.	M.I.19.1. Use of different languages, style of language and vocabulary according to the type of audience. M.I.19.2. Number and nature of the venues and attendees at the organised workshops or dissemination activities.
	I.20. Accessibility, usability and reproducibility of the resources shared by the project.	M.I.20.1. Number of users, downloads and traffic on the website. Interactions with the different project partners. M.I.20.2. Number and types of channels used to disseminate the outcome. M.I.20.3. Conduct a feedback survey to analyse the types of public and user's experience.

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