



**Cultural Alliance of Fairfield County  
Strengthening the Arts and Culture Community**

**A Knowledge Process Report**

In partnership with Angela K. Frusciante, PhD/ Knowledge Designs to Change

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# Summary

In the Fall of 2022, the *Cultural Alliance of Fairfield County* (CAFC) engaged *Knowledge Designs to Change*, a strategy and research partner, to guide a process to identify key indicators of CAFC's work. Indicators would be used to document and understand the contribution of CAFC's structure and activity in meeting the organization's mission. A targeted emphasis was placed on CAFC's ongoing desire for the broadest inclusion and equitable change in the region's arts and culture landscape.

CAFC holds a unique position and purpose in the region. CAFC is a 501c3 nonprofit serving the arts and culture community. At the same time, CAFC supports individual and organizational members. CAFC is also a state-designated intermediary in the region, providing important connections to the state and national arts agencies, advocacy, and network building. From its very beginnings, equity and inclusion have been part of the design of CAFC's work. This fourfold positioning is powerful and also complex when it comes to prioritizing activities and related indicators.

Participants in the knowledge process included the board chair (the former board chair attended on one occasion), the executive director, marketing and administration staff (development staff attended the first few meetings), and an equity and community consultant (who had been a key arts agency leader in the state's creation of designated regional service organizations).

Throughout the knowledge building process, these key points surfaced:

- CAFC is a unique organization and serves an essential purpose in the region.
- CAFC's multiple roles contribute complexity and opportunity to its efforts and mission.
- Integrating these roles is essential to making the best decisions for the organization's structure and activities.
- Extreme regional disparities -- based in wealth, race, resources -- require CAFC's focus on equity and inclusion in its structure, approach and activities.
- CAFC's approach, grounded in the power of relationships, creates the conditions for strengthening the arts and culture community.
- Peer learning groups, network building, and convening all enable the arts and culture community to better contribute to a healthy and thriving economy and region. These shared learning opportunities would not form without the support of CAFC's dedicated facilitation.

The following report outlines the results of the knowledge process including essential categories, example indicators, and an emerging discussion and decision-making framework to support board and staff in maintaining and continuing to grow CAFC's relationships, reputation, and opportunities.

Additional operational documents are provided as the design specifications needed for targeting and deepening data collection and analysis for learning, documenting, and sharing CAFC's work.

These internal documents that contribute to developing a streamlined indicator system include:

- Exploration of data collection activity through fiscal year 2019.
- Process reports that track the knowledge team discussion and essential indicator categories.
- A “datamaking” matrix that houses information about key questions, data points and collection, and analysis processes for making meaning of the indicators.
- A data memo that provides key desired functionality for a suitable software platform and lists key data points and a sample interim data format to be used to unify existing data.
- A sample dashboard format that can be used by staff and board conversations.
- A decision-making framework to be used with the dashboard for staff and board discussion.

An indicator system is valuable if it contributes to the learning, communication, decision-making, and ability of the organization to better convey its work to its community, funders, and the broader public. During times of leadership transition, the products of a knowledge process can also be used to acclimate future executive directors to the core elements of the organization. It can also be used to orient new board members and staff.

This CAFC knowledge process provides the design parameters for an indicator system. The next steps in operationalizing this system are to:

- Identify a single data software platform that can be used both for day-to-day operations and feedback as well as longer term learning, and decision making.
- Migrate all information into the single platform using the proposed database design.
- Adopt the proposed dashboard design for discussions between staff and board.
- Regularly use the proposed decision-making framework for staff and board discussions.

CAFC’s current approach relies heavily on the practice of peer group learning. CAFC can continue to utilize its knowledge work to:

- Maximize the peer group learning approach as the configuration for professional development, network building, advocacy, and nurturing equitable inclusion.
- Delve into the learning of peer group members by identifying targeted peer group indicators, and linking peer groups to each other through.
- Facilitate learning and action discussions within and across peer groups to increase engagement of participants in the network and its advocacy.
- Convene conversations that build a sense of shared ownership that, in turn, attracts resources of all kinds.

Engaging in knowledge work as integrated into a broader strategy can help to sustain CAFC’s mission by deepening member and community engagement, strengthening decision making, and attracting future investment into programming and continued network building.

# Developing an Indicator System

## Cultural Alliance of Fairfield County and Its Knowledge Work

CAFC holds a unique position and purpose in the region. CAFC is a 501c3 nonprofit serving the arts and culture community. At the same time, CAFC supports individual and organizational members. CAFC is also a state-designated intermediary in the region, providing important connections to the state and national arts agencies, advocacy, and network building. From its very beginnings, equity and inclusion have been part of the design of CAFC's work. This fourfold positioning is powerful and also complex when it comes to prioritizing activities and related indicators.

In the Fall of 2022, the *Cultural Alliance of Fairfield County* (CAFC) engaged *Knowledge Designs to Change*, a strategy and research partner, to guide a process to identify key indicators of CAFC's work. Indicators would be used to document and understand the contribution of CAFC's structure and activity in meeting the organization's mission. A targeted emphasis was placed on CAFC's ongoing desire for the broadest inclusion and equitable change in the region's arts and culture landscape.

Although learning happens all the time as we adapt to our current conditions, knowledge building is about looking deeply at our organizational structures, activities, information generated, information used and our decision making. The value of any knowledge process and the data collection that happens as a result is based on its contribution to the learning, communication and decision-making, and ability of the organization to better convey its work to its subscribers and audience, members, communities, funders, partners, and the broader public. However, a knowledge process is not only about communicating outwardly. It is about engaging in relationships and continually listening and learning through relationships. Knowledge work is really about our ways of being and showing up in the world. This knowledge process has been engaged with this intention.

The first phase of CAFC's knowledge process focused on the idea of "datamaking" – data as an intentional action and an investment into the organization's capacity and success. In an information society, where we are bombarded with information every minute of the day, datamaking can help us to identify and streamline what matters most to pay attention to in our day-to-day. It also helps us to maximize the use of our daily information and feedback for making longer-term organizational and strategy decisions.

To ensure that multiple organizational viewpoints were incorporated into the data system design, participants in the knowledge process included the board chair (the former board chair attended on one occasion), the executive director, marketing and administration staff (development staff attended the first few meetings), and an equity and community consultant (who had been a key art's agency leader in the state's creation of designated regional service organizations).

Together, the group, over a nine-month process, looked deeply at indicators and developed essential indicator categories for data collection and interpretation. (Our specific step-by-step process and notes about putting the datamaking into practice are included following this next section.)

## Indicator Deep Dive

The knowledge discussion helped to focus attention on the top categories that help to make visible the work that CAFC is doing and the conditions that the alliance is creating for a strong arts and culture community. CAFC's core values always serve as a lens for indicator analysis and discussion.

**Broaden belonging** – ready to embrace all who want to participate

**Listen and respond** – from a place of deep respect

**Activate stewardship** -- nurturing, facilitating, energizing, amplifying our arts and culture community

**Cultivate Trust** -- in building relationships

\*see full values statement at: <https://culturalalliancefc.org/who-we-are/values/>

## Essential Indicator Categories

**Reach and Relevance.** For this category, we are exploring aspects like membership numbers; membership interactions with CAFC; the full audience that includes but goes beyond members; participation in CAFC offerings; continual and emergent relationships with CAFC; CAFC's role as an information support, collaborator, and advocate. We are wanting to understand how far and wide and deeply CAFC's work is felt and by whom. We started our team discussion asking -- What indicates relevance for each connection? In what ways is CAFC – or a specific offering -- relevant?

The types of data that can help us deepen our understanding include: counts of subscribers, members, and people who engage in social media; characteristics of participants; numbers of people who participate in offerings. We can ask participants directly how they perceive the relevance of CAFC's work or we can infer relevance by tracking participant numbers over time. We can notice how many people reach out to CAFC for information and document why as well as tracking how many people connect with CAFC for collaboration, partnership or solidarity in advocacy efforts. For any of the data that we are tracking, we can seek out demographic information such as race, gender, economic bracket and so on, to help in recognizing how CAFC is doing in relation to its inclusion commitments.

**Contribution to Equity-Focused Change.** Another category involves data that can help to make visible where *Short-Term impact has the potential to Contribute to Equity Focused Change*. For this category, we can draw from relevance and value but also want to know more about how things are changing for the people who engage with CAFC. We are exploring what actions participants identify related to equity and if they take these actions; how participant awareness about equity shifts in relation to CAFC engagement; and if and how participants connect CAFC information, offerings and support to positive change.

Beyond direct participation, we also want to know how CAFC's work is increasing inclusivity in the overall arts and culture infrastructure and how CAFC peer groups are increasing a sense of belonging and contributing to network building and learning. If there are any barriers to this inclusivity, we want to understand those better. We want to collect data that helps us to deepen the connection between CAFC's efforts and greater inclusivity across the arts and culture arena. We started our team discussion asking: What short-term (month to year) happenings can tell us that CAFC is contributing to equity-focused change?

The data that we can collect and apply to this area include: member's direct feedback about contribution of CAFC participation to their awareness and action. We can ask if new relationships have been encouraged through CAFC and if individuals increase their engagement in the network. We can ask members about their

sense of belonging and note variations by group. We can track who is attending diversity, equity and inclusion targeted offerings.

**Value & Engagement.** Another category is the *Value of CAFC to members and the broader audience, communities and region.* Value and engagement are related to specific activities and offerings as well as the organization's presence and collaboration as a whole. For this category, we understand that there are many different people that CAFC is in relationship with and that these people often are in more than one category. We want to understand the value that CAFC brings to its partnerships and the broader arts and culture community. While CAFC often receives unsolicited anecdotes and testimonials, it is important to identify indicators that can more consistently and systematically be utilized over time as data.

We also noted that relevance and value can often be interpreted through similar data. We therefore can also identify which data points might speak to both categories. We want to collect data that helps us to target our supports in the ways that are most valuable to our members, partnerships, and the broader community. We start our team discussion asking what data indicates/helps us understand how valuable CAFC's work is to various people and partners and how can we identify any barriers or opportunities to broadening the diversity of those who find value in being part of the alliance.

For this category, the data that can help us to understand perceptions of CAFC value and engagement include: membership retention over time; awareness of alliance activities by members and audience; repeat participation in offerings; donations; use of CAFC tools such as the calendar listing; social media engagement; and how many participants can point to specific changes in awareness or behavior that they attribute to their participation in CAFC offerings.

Taken together, the indicators that pertain to the categories of Reach/Relevance, Contribution to Equity-Focused Change and Value and Engagement can help to deepen our understanding of CAFC. Using these indicators as the beginning and framing for staff and board discussions can encourage conversation and robust decision making that is grounded in organizational experience. Connecting these indicators to community input, shifts in context, and determinations of organizational resources, will make for the most strategic decisions and organizational success.

The following step-by-step process was used in developing the essential indicator categories. A proposed decision-making framework and sample dashboard are provided as framings for these conversations.

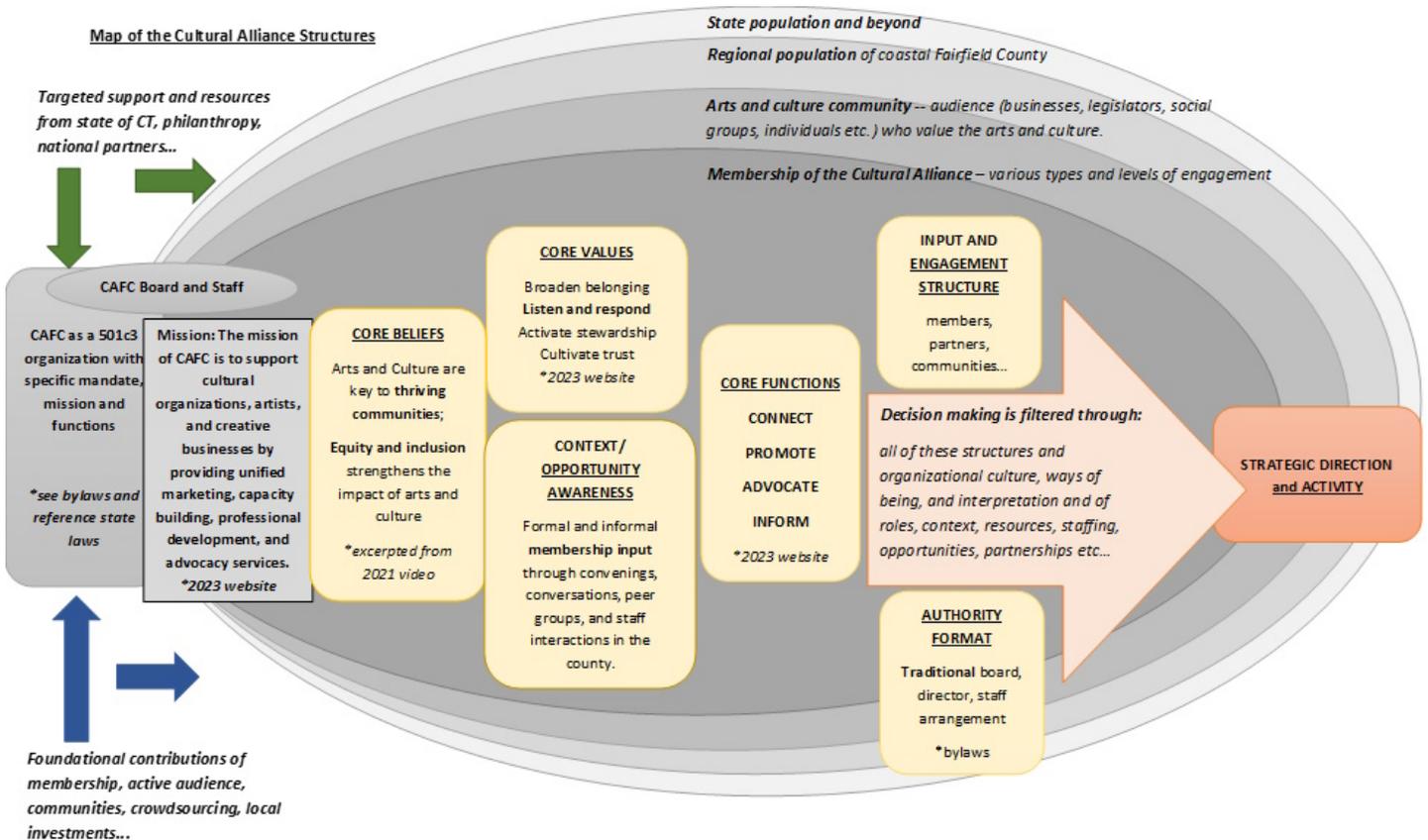
Although the knowledge process was intended to design a data system, even as we engaged in discussion, real-time adjustments were being made to begin to align the organization's work with the emerging system.

# Step-By-Step Process

The following steps provide an overview of CAFC’s knowledge process. The graphics provide highlights that emerged in discussion and exploration. Additional detailed versions of each step have been provided as attachments to support the organization in operationalizing the knowledge work into a full data/indicator system.

## Step 1: Map out the approach, activities, and basic history of the organization.

Using existing information the mapping provides an overview of the organization’s structure and activities. This is the first step in identifying priority indicators and also noting the best opportunities for collecting relevant data.



## Step 2: Use a data making matrix to identify key questions, categories and existing information.

A matrix was used initially to bring together ideas and practices related to data. The matrix allowed for multiple perspectives and entry points for participants with various individual work styles and organizational roles. The matrix was also used to document the specifics needed to collect and make meaning of the targeted indicator data. The matrix helped the group to identify three priority indicator categories.

Essential Categories identified are: CAFC’s Reach/Relevance; CAFC’s Short-term impact leading to equitable change; CAFC’s Value to members and the broader audience, communities, and region

### “Datamaking” Matrix Format

<p><b>Core values as a lens for each category</b></p> <p><b>Broaden belonging</b> – ready to embrace all who want to participate;  <b>Listen and respond</b> – from a place of deep respect;  <b>Activate stewardship</b> – nurturing, facilitating, energizing, amplifying our arts and culture community;  <b>Cultivate Trust</b> – in building relationships.</p>
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**Goal for “data” is information that is targeted, systematic, and connected to a question and a way to make meaning of the information.**

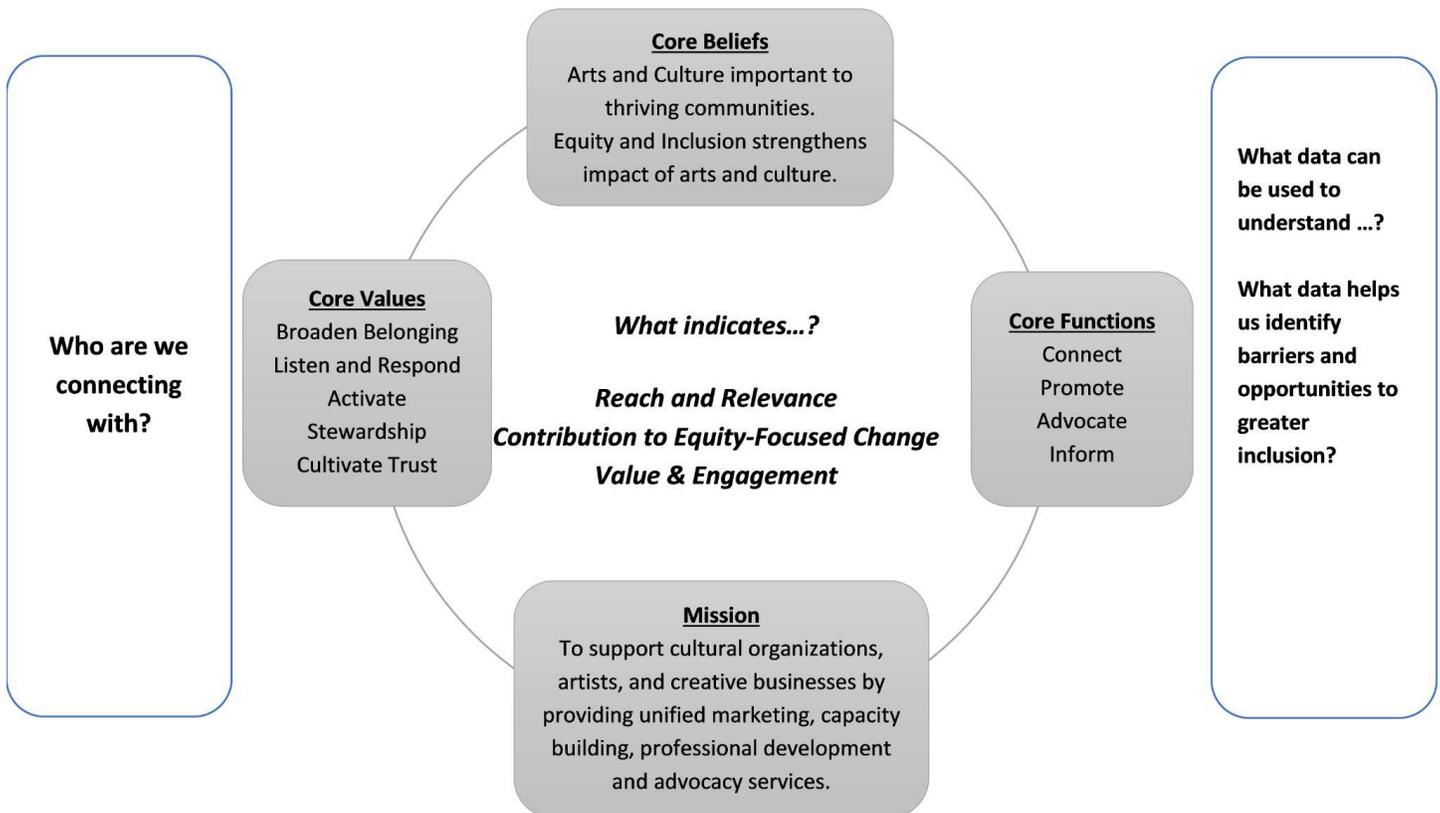
<p><b>Essential Category of Understanding</b>          For this category, we are exploring .....</p>						
<p>We want to understand ...</p>						
<b>Focus areas –</b> what do we want to understand better {interest question}	<b>Data Point – information</b> that is collected systematically	<b>Data Collection</b> how to collect {what questions, where asked, how gathered}	<b>Making Meaning of</b> single data points	<b>Making Meaning of</b> multiple data points	<b>Evidence Based Statements</b> to self (board and staff), to public, to membership, to funders, to legislators.	<b>Opportunities/Barriers to inclusion –</b> how to identify

### Step 3: Discuss essential categories to identify specific indicators.

The discussion of essential categories was framed in order to stay connected to organizational relationships, core beliefs, core values, core functions and organizational mission.

#### Indicator Discussion Format

Essential Categories for making work visible.



## Step 4: Utilize the above work to design an indicator system.

Specifications for creating the indicator system are included in the datamaking matrix and an additional data memo as well as a sample dashboard for reporting on the designated data.

**Sample Dashboard – For Illustration Purposes Only**  
*(Free Vector Images Courtesy of Speckyboy 2023)*

### Basic Operational Indicators

<p>Unique subscribers by relationship type/ % that have more than one relationship</p> 	<p># members by type and geographic location</p> 	<p>Budget #s by category over time</p> 	<p>Value ratings from participant feedback form (# and text)</p> 
<p>Resources in relationship to membership and audience</p> 	<p>Analysis of activities and their integration.</p>		

### Essential Indicator Categories (3 year rolling data)

#### CAFC's Reach and Relevance

<p>Demographics of members compared to adult population in region</p> 	<p>Demographics of subscribers with census track stats</p> 	<p>Participant numbers in activities</p> 	<p>Membership by type and demographics</p> 
<p>Analysis about engagement and participants' perceived relevance</p>			

#### CAFC's Contribution to Equity-Focused Change (short-term impact leading to equitable change)

<p>Participants identifying a specific change or action</p> 	<p>Participant indication of new relationship (# and text)</p> 	<p>Peer group participation and perceived benefit of connecting (# and text)</p> 	<p>Sense of belonging participant (# and text)</p> 
<p>Analysis about participant shifts in awareness and action</p>			

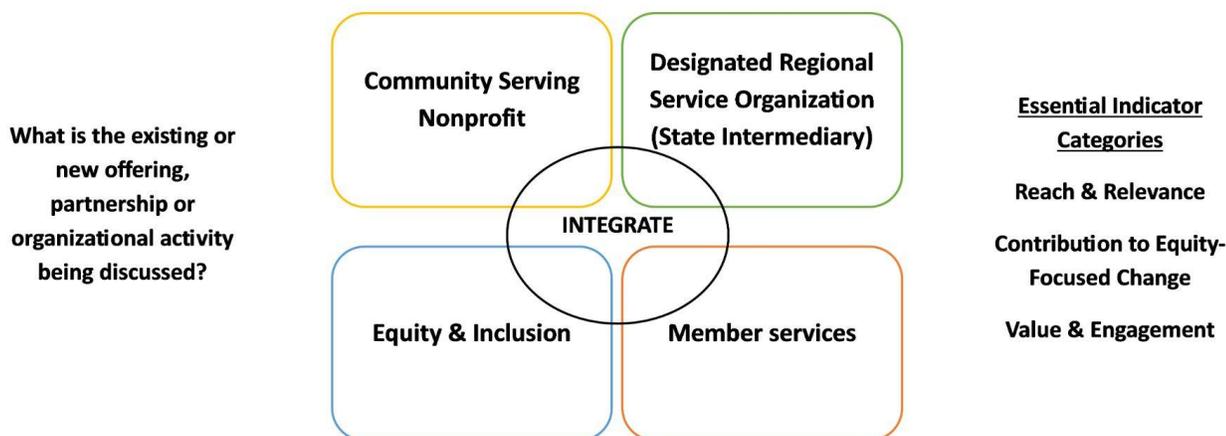
#### CAFC's Value & Engagement (to members and the broader audience, communities, and region)

<p>Use of event listing, website, social media</p> 	<p>Length of membership Repeat participation in activities</p> 	<p>Participants identifying a specific change or action</p> 	<p>Partnership requests and perceived value (# and text)</p> 
<p>Analysis about perceived benefits of CAFC's leadership and collaboration</p>			

## Step 5: Design a framework for utilizing the indicator system.

A framework is useful to continue shared meaning-making and for discussing indicators in the context of organizational decisions. This framework foregrounds the fourfold power of CAFC’s positioning and emphasizes the importance of integrating these when reflecting on current activities and future opportunities.

### Decision-Making Framework



#### Decision-Making Discussion:

What purpose does the offering, activity, partnership address? How does the offering, activity, or partnership integrate our key areas of purpose?

How does the offering, activity, partnership align with CAFC’s core values? How does engaging in this offering, activity, or partnership support CAFC to embody its values?

How does this offering, activity, or partnership align with CAFC’s core function of connecting, promoting, advocating, and informing?

How does this offering, activity, or partnership tap into CAFC’s strengths?

Which of our priority indicators can help deepen our perspective on this offering, activity, or partnership?

What is the draw of this offering, activity, or partnership on CAFC’s resources of staff, board, volunteers, dollars, and bandwidth?

How does this offering, activity, or partnership contribute to setting the conditions for a stronger arts and culture community that activates thriving and equitable communities?

## **Recommendations for Embracing Indicators to Strengthen Decision-making**

CAFC's effectiveness is built on its commitment and ability to interpret and shift organizational approach, structures, operations and programming through the lens of its core values. The organization's core values are built into the decision-making framework and are present throughout our questions and our collection and use of data. Core values also encourage us to engage members, partners and our community in making meaning of the data collected.

This CAFC knowledge process provides the design parameters for an indicator system and suggested frameworks for using indicators as the basis for targeted staff and board conversations. The next steps in operationalizing this system are to:

- Identify a single data software platform that can be used both for day-to-day operations and feedback as well as longer term learning, and decision making.
- Migrate all information into the single platform using the proposed database design.
- Adopt the proposed dashboard design for discussions between staff and board.
- Regularly use the proposed decision-making framework for staff and board discussions.

## **Opportunity for CAFC's Continued Knowledge Work**

CAFC's current approach relies heavily on the practice of peer group learning. Peer groups serve as the configuration for professional development, network building, advocacy, increasing belonging, and nurturing equitable inclusion. The above knowledge process can be applied to CAFC's peer group approach using the same participation tracking and feedback questions. However, there is additional learning and design work that could benefit CAFC and the broader arts and culture field.

Additional knowledge work can support CAFC to enhance learning of peer group members, identify targeted peer group indicators, and further link the peer groups to each other. Facilitation of learning and action discussions within and across peer groups can actively engage participants in CAFC and strengthen the network and its advocacy. Convening conversations that build a sense of shared ownership can attract resources of all kinds

Engaging in knowledge work as integrated into a broader strategy can help to sustain CAFC's mission by deepening member and community engagement, strengthening decision making, and attracting future investment into programming and continued network building.

## **Additional Documents**

These internal documents that contribute to developing a streamlined and indicator system include:

1. Exploration of data collection activity through fiscal year 2019.
2. Process reports that track the knowledge team discussion and essential indicator categories.
3. A “datamaking” matrix that houses information about key questions, data points, data collection and analysis processes for making meaning of the indicators.
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