Story of Change

Why Story of Change?

If we are to make a big difference, we need to be able to understand clearly what we are doing and how, and then communicate that with other people.

Happy Museums use a Story of Change to plan and review. It is a very simple process, but can be enormously helpful to people to clarify what they are doing, in a way that's appealing.

The purpose of the Story of Change is to make sure we focus on the difference we want to make rather than what we do (which is similar to theory of change, or logic modelling). It challenges 'business as usual' by starting with the overall purpose and working backwards. Hopefully, we don't then confuse the means to the end (our activities, which are often what is monitored by funders) with the ends themselves.

Planning what we want to achieve

Who?	How?	What?	Why?	Why?
The people who matter	Drivers and investment	Delivery	The difference we make	A vision

Delivering what works

Who?	How?	What?	Why?	Why?
The people who matter	Drivers and investment	Delivery	The difference we make	A vision

How to plan your Story of Change

We explain in this video: https://vimeo.com/70921687

The best way to plan a Story of Change is on a big sheet of brown paper with post it notes so you can move things around as you refine where they should be.

1   Start by establishing the **vision**. What is it that you really hope this project will help your organisation to be or achieve in, say three to five year's time. Sometimes it helps to free up thinking to do this as a picture, or mindmap, or even a tableau – which is a drama technique. If you are doing this with others, really push them on the aspiration here. Your project will work towards this vision, but not necessarily achieve it within its timescale, and other things may also be necessary to make it happen.

2   Next agree who are the **people who matter** in this story. The people who either experience the change or are important to make it happen. The people who feel the change. Think here about different stakeholders as well as the immediate participants; there may be knock on effects.

3   Then clarify what difference the project will make, why are you doing it?

4   Make sure the logic stacks up – will these outcomes really lead to your visionary change?

5   Make sure as well that these are not actions, but instead real changes or outcomes, for example changes in understanding, behaviour, knowledge, attitudes or situations. A useful discipline is to ask 'so what?' until you've reached the end goal. You might want to split these into early and later outcomes.

6   Then agree what we deliver to make the difference we've described. You might want to be explicit about who's involved too.

7   Make sure the logic stacks up – will these activities really lead to the changes you've described above?

8   Finally clarify how the project will come about, the drivers for change and the inputs necessary. They might be resources, but also less tangible commitments like knowledge, cultures and values, or a particular type of good practice.

9   Make sure the logic stacks up – do you have everything you need to do the activity?

10 Then there are two key questions to balance aspirations with realism:

    • If you do what you've planned will you get where you want to be?

    • Is it achievable?

You should then use the Story of Change in two ways:

Project planning

- What are the milestones?

- Who are the people and what are the resources we need?

- What are the risks/challenges and how will we manage them?

- What are the opportunities and how will we grasp them?

Evaluation and learning

- How will we know we've achieved what we planned? (think numbers and quality, think objective and subjective evidence). We need evidence for all the outcomes, and for anything else in the story that we think is particularly challenging, or particularly interesting.

- How will we collect the evidence? Will it capture unplanned events too?

- Is the evidence that you've planned to collect enough to show what you want to show?

- Is it too much? Is it doable?

In summary:

| The people who matter, they either experience or make the change	The drivers – what we invest or commit, or HOW we deliver	Deliver – the activity and participation, or WHAT we do	The difference we make – the outcomes, impact and value, or WHY we're doing it	
The people	The inputs	The outputs	The outcomes	The vision
For example, audiences, participants, workforce, museum sector, community…	For example, resources, principles, good practice…	The programme of activity and who and how many are involved	For example, different skills, attitudes or behaviours… different achievements…	Where you want to be in, say, three years… what you hope this project will set in train

Additional resources

Our tool provides extra worksheets to support your planning or evaluating.

- The plan template is linked from the story of change, which should include everything you plan to do. We've used some formulae and conditional formatting so that a gantt chart automatically appears.

- The budget template is also linked from the story of change. Because the SoC describes inputs and outputs (or returns) these translate to income and expenditure on the budget.
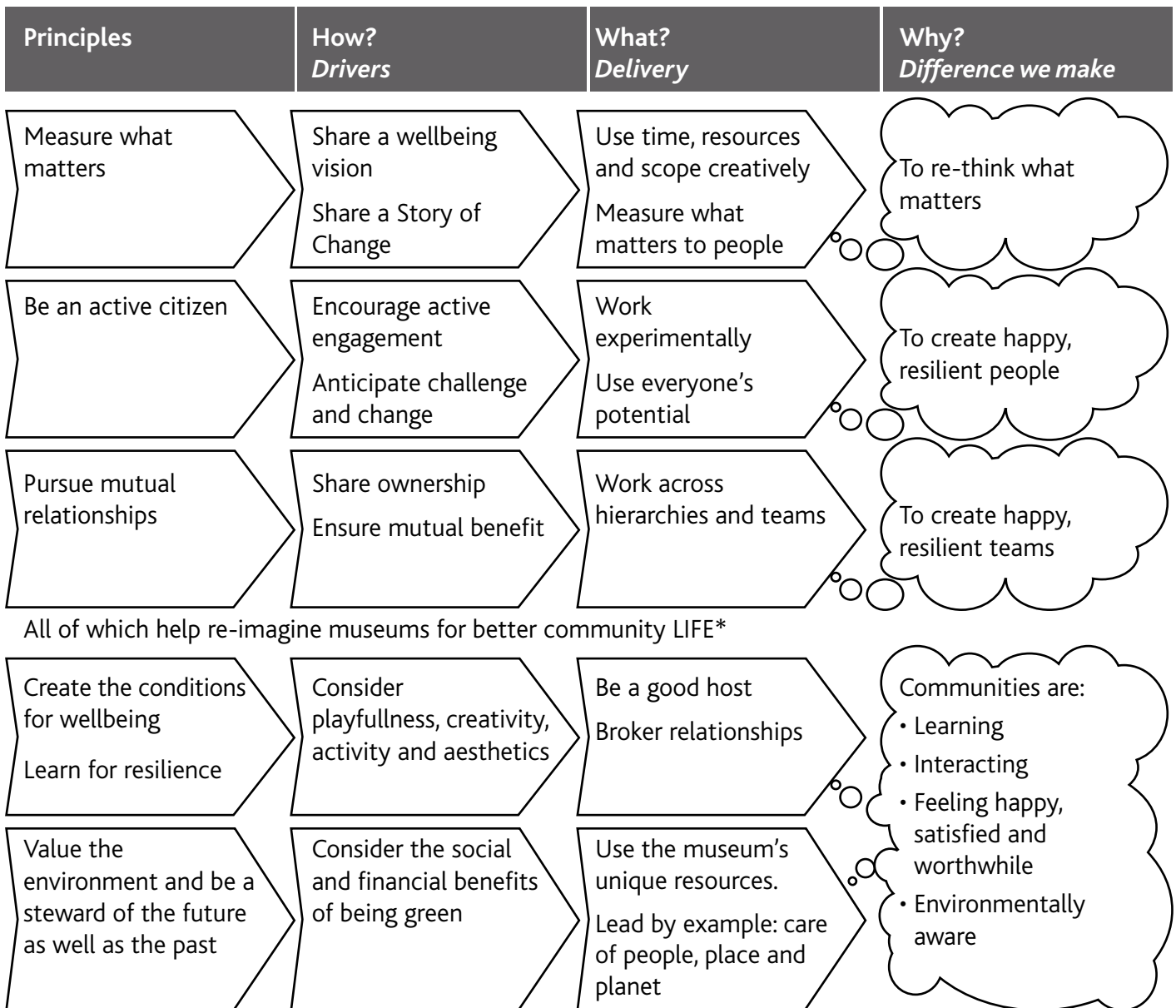
We've split this into a triple-line budget; what we call Culture3 planning, in which you can consider not just the financial inputs and outputs (or income and expenditure) but the social or cultural, and environmental or natural ones too. At its most sophisticated you could use carbon calculators and proxy values to make this numeric. At a basic level it encourages discussion and consideration of whether you are in credit or have a debt to the planet, or your community.

Triple bottom line thinking is an established concept that helps to link people, planet and profit (or surplus). This diagram shows how it links Happy Museum thinking.
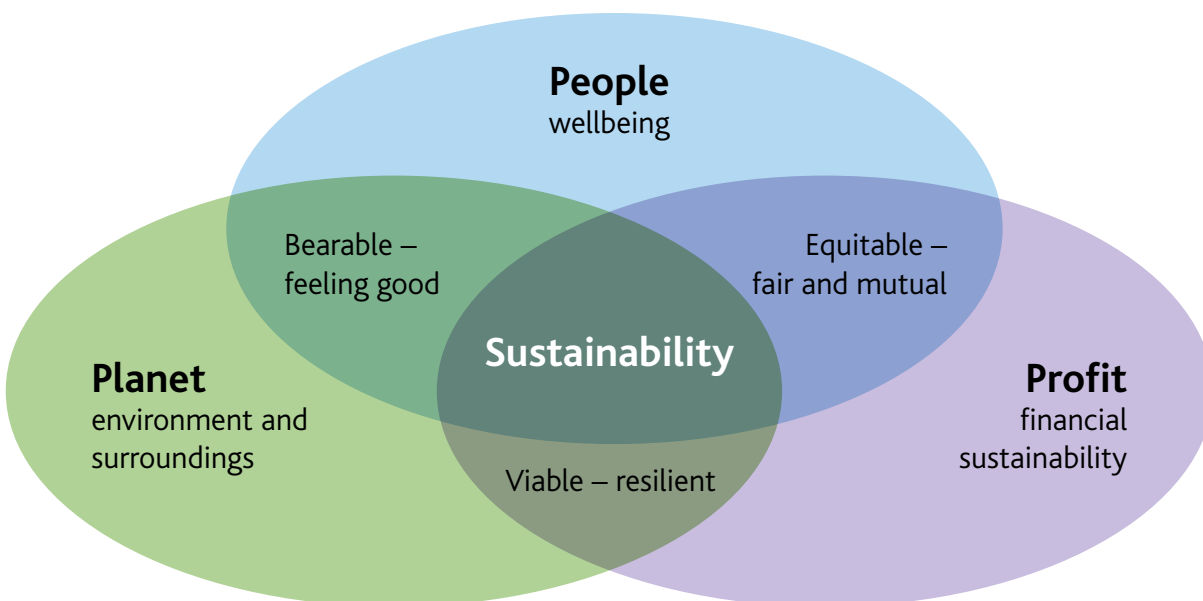
- The evidence collection template provides a place to put data sources identified through the story of change work. It includes a schedule as a reminder for thinking about baselining as well as interim and final learning.

- The evidence framework template links to both the story of change and the evidence collection template, giving an overview of all the data you need and where it can come from, so you can get the most out of every data source you have.

Happy Museum Story of Change

Principles	How? Drivers	What? Delivery	Why? Difference we make
Measure what matters	Share a wellbeing vision / Share a Story of Change	Use time, resources and scope creatively / Measure what matters to people	To re-think what matters
Be an active citizen	Encourage active engagement / Anticipate challenge and change	Work experimentally / Use everyone's potential	To create happy, resilient people
Pursue mutual relationships	Share ownership / Ensure mutual benefit	Work across hierarchies and teams	To create happy, resilient teams

All of which help re-imagine museums for better community LIFE*

Principles	How? Drivers	What? Delivery	Why? Difference we make
Create the conditions for wellbeing / Learn for resilience	Consider playfullness, creativity, activity and aesthetics	Be a good host / Broker relationships	Communities are: • Learning • Interacting • Feeling happy, satisfied and worthwhile • Environmentally aware
Value the environment and be a steward of the future as well as the past	Consider the social and financial benefits of being green	Use the museum's unique resources. / Lead by example: care of people, place and planet	

* The Happy Museum Project is conducting a national LIFE survey, where LIFE = Learning, Interactions with others, Feelings and emotions, and Environmental awareness. More: www.happymuseumproject.org