# Practical Guide for the use and management of the self-assessment tool:

## From Application to Implementation, Monitoring and Legacy

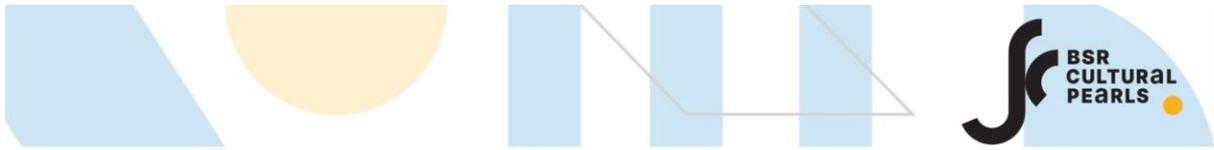Appendix 3 of the final evaluation report

November 2025

## Introduction: purpose, audience and how to use this guide

This Practical Guide consolidates step-by-step guidance, templates and checklists, and integrates the Self-Assessment Tool User Manual and the Data Manager Explainer into a single handbook.

It is a roadmap for municipalities applying for and implementing the BSR Cultural Pearls title. It translates evaluation findings into actionable steps from first scoping to long-term legacy, and provides templates and checklists you can adapt locally. The primary audiences are municipal leads and project managers, cultural and creative sector (CCS) partners and NGOs, mentors and project partners, data managers, and communications teams.

How to use: read sequentially the first time; afterwards, dip into the phase-specific checklists and templates as you plan, deliver and review your Culture and Resilience Action Plan (CuReAP).

## 1. Principles to keep front-of-mind

- Start from what already has traction locally. Use the Pearl to legitimise and scale, not to invent everything from scratch.
- Depth over breadth. Pearls are not expected to work across all outcomes. Prioritise the outcomes that matter to your community now and build a personalised monitoring approach around them.
- Low-threshold participation. Design formats that are simple to enter, visible in everyday life, and easy to repeat.
- Institutionalise what works. Convert successful formats into routines (annual civic rituals, resident panels, youth producer pathways).
- Use the network. Treat mentoring and peer exchange as the programme's backbone; translate the network into portable practices.
- Evidence with proportion. Collect a minimum viable dataset well, then add depth where it informs learning or advocacy.

## 2. Phases at a glance

- **Phase 0:** Strategic positioning & readiness — diagnostics, outcome selection, governance, ethics and risk.
- **Phase 1:** Application — problem framing, preliminary CuReAP, realistic budget, mentoring.
- **Phase 2:** Co-creation & planning — stakeholder mapping, engagement design, accessibility and safeguarding, workplan and procurement.
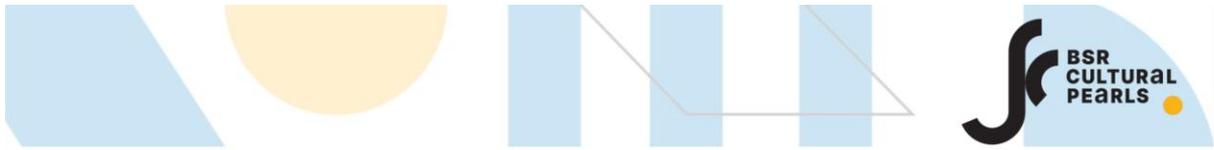
- **Phase 3:** Delivery — operations, partner coordination, communications, inclusion checks, documentation.
- **Phase 4:** Monitoring, Evaluation & Learning (MEL) — integrated use of the Self-Assessment Tool, review, data ethics/GDPR, adaptive management.
- **Phase 5:** Sustainability & legacy — policy integration, capability pathways, Baltic-wide network.

## 3. Phase 0 — Strategic positioning & readiness

### 3.1 Rapid local diagnostics (2–3 weeks)

- Map priority community needs and assets (e.g., youth disconnection; under-used venues; intergenerational gaps).
- Identify existing formats with traction that can be scaled or reframed through the Pearl.
- Shortlist Resilience outcomes from the evaluation framework that directly respond to needs and build on assets.

### 3.2 Select priority outcomes and define scope

- For each selected outcome, note an indicative activity idea, the target group(s), and a plausible delivery partner.

### 3.3 Ethics, accessibility and risk

- Draft a one-page accessibility & safeguarding note (barrier-free venues, youth protocols, inclusion standards).
- Create a risk register and simple mitigations.

Template — Risk register (excerpt):

*Risk ID | Description | Likelihood | Impact | Mitigation | Owner | Review date*

## 4. Phase 1 — Application

### 4.1 Problem framing and Theory of Change (ToC)

- Articulate the change pathway: inputs → activities → short-term outcomes.
- Name assumptions (e.g., school calendar supports youth engagement; bus links are feasible).
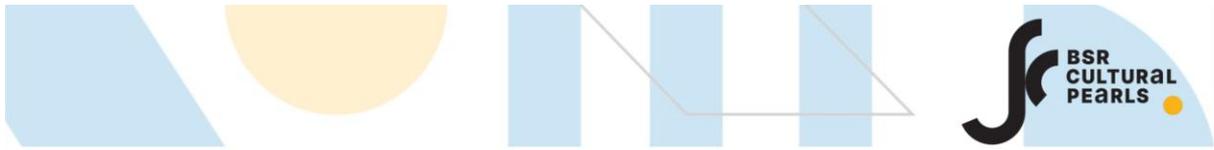
## 5. Phase 2 — Co-creation & detailed planning

### 5.1 Stakeholder map and engagement plan

Template — Stakeholder matrix (excerpt):

*Stakeholder | Role in CuReAP | Reach | Engagement method | Value exchange | Contact owner*

### 5.2 Participation design: low-threshold entries

- Drop-in clean-ups, pop-up making, street-level storytelling booths, lunch-hour concerts near public services, 'bring-a-friend' invitations.
- Ensure formats are visible, repeatable, and time-sensitive to local rhythms.

### 5.3 Inclusion, accessibility and safeguarding

- Multi-language signage; step-free access; sensory-friendly slots; childcare; youth consent and chaperone rules; photo/AV consent routines.

### 5.4 Workplan and procurement

- Build a Gantt with monthly milestones; align with school terms and city festivals.
- Pre-clear procurement for micro-commissions (community artists, bus hire).

## 6. Phase 3 — Delivery

### 6.1 Partner coordination and volunteer care

- Micro-contracts/MoUs with partners.
- Volunteer rota with task rotation and recognition (certificates, open-stage time, thank-you notes).

### 6.3 Communications-in-practice

- Single event sheet per action (who/where/when/what to bring/how to join) reused across channels.
- Community champions as co-messengers; newsroom-style photo prompts to document outcomes.

Delivery checklist:

- Event sheets prepared and shared.
- Roles clear on the day; safeguarding brief done.
- Quick capture of counts and quotes; photos/audio labelled.
- After-action notes filed.
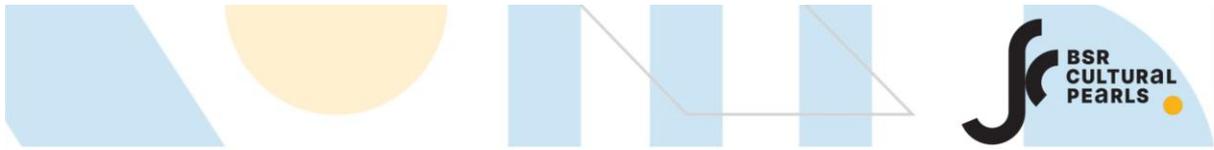
# 7. Phase 4 — Monitoring, Evaluation and Learning (MEL)

This section integrates the Self-Assessment Tool (Excel), the User Manual, and the Data Manager Explainer. It turns the evaluation framework into daily practice while keeping the burden reasonable.

## 7.1 Minimum viable dataset (MVD)

- Scores (1–5) for the priority outcomes you selected (not all outcomes).
- A brief reflection (one example per scored outcome).
- Simple counts where relevant (attendance, venue use, repeats).
- One quote or image/audio per activity that evidence change (with consent).

## 7.2 Using the Self-Assessment tool in your workflow

- Before delivery: set Priority = Y for the outcomes you will pursue. This creates your personalised dashboard.
- During delivery: log quick evidence; avoid over-collection.
- Monthly: update Score (1–5) and Reflection fields using evidence and team input.
- Mid-term and end-of-cycle: review the Dashboard (priority averages, interpretation) with mentors and agree adjustments.

Assessment Form columns (summary):

*A Dimensions of outcomes | B Outcomes | C Priority? (Y/N) | D Indicators | E Type | F Evaluation question | G How to measure it | H Score (1–5) | I Reflection*

Dashboard logic (key formulas):

**Average score (priority)***: =AVERAGEIFS('Assessment Form'!$H:$H,'Assessment Form'!$A:$A,$A2,'Assessment Form'!$C:$C,"Y")*

**Interpretation:** *=IF(C2>=4,"Strong",IF(C2>=3,"Moderate","Needs attention"))*

## 7.3 Data collection methods aligned to the framework

- Municipality survey items (counts, governance practices, partnership persistence).
- Mentor-guided group discussions (belonging, confidence, trust, solidarity).
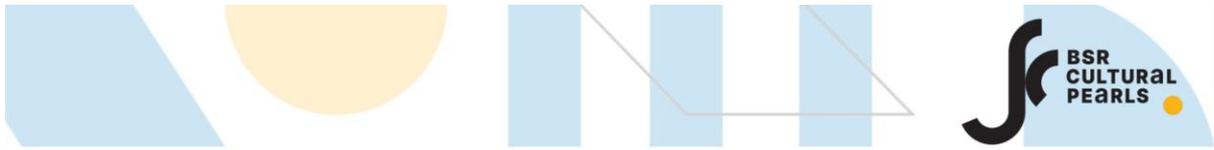
- Short pulse prompts (before–after belonging/agency) via cards/post its/QR.
- Observation notes (e.g., intergenerational mixing; first-time participants).

### 7.4 Quality, ethics, GDPR

- Keep only what you need; pseudonymise notes; secure consent for images/AV.
- Store data in one protected folder with a simple data inventory and retention dates.

### 7.5 Using findings for learning and decisions

- Trigger micro-changes (e.g., switch time/venue, change facilitation) based on mid-term scores and reflections.
- Where priority averages are <3 ('needs attention'), consult the recommendation cues embedded in the tool.
- Where ≥4, plan institutionalisation (policy note, annual budget line, SOP template).

## 8. Phase 5 — Sustainability & legacy

- Convert successful formats into standard operating procedures (SOPs) in relevant departments (culture, youth, social).
- Propose light multi-annual budget lines (venue activation, micro-grants, mentoring, MEL).
- Turn participants into co-producers (youth producer courses; resident panel convenors).
- Adopt or contribute two travelling practices per year; co-credit and co-document with other Pearls.

## 9. Checklist

### Application

- Outcomes prioritised and mapped to activities
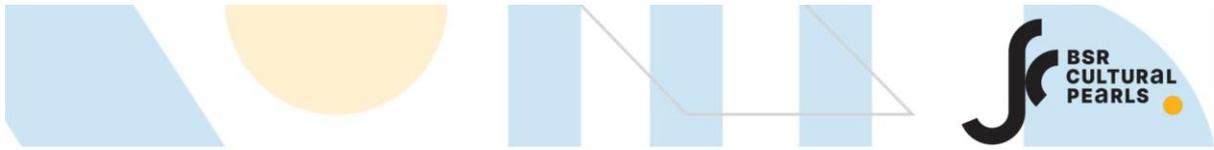
- Theory of Change clear; assumptions named
- Mentoring and network intentions explicit

### Planning

- Stakeholder roles and contacts assigned
- Accessibility & safeguarding minimums met
- Workplan/Gantt set; procurement routes ready

### Delivery

- Event sheets done; on-day roles and scripts ready
- Quick data capture set up (counts, quotes, photos)
- After-action reviews logged

### MEL

- Self-Assessment Tool configured (Priority = Y; dashboard)
- Scores and reflections updated
- Mid-term adjustments agreed with mentor