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MAKING VALUE VISIBLE IN THE CULTURAL SECTOR: LINKING PARTICIPATORY EVALUATION TO ORGANISATIONAL OBJECTIVES

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Abstract *This study examines ex-ante impact assessment (IA) as a strategic governance tool in cultural heritage, challenging its reduction to retrospective accountability. Applying the SoPHIA (Social Platform for Holistic Heritage Impact Assessment) framework — developed within Horizon 2020 — to Forma Urbis Museum at Celio Archaeological Park in Rome, the research adopts a qualitative and participatory design. The institution's recent establishment and absence of formalized planning offered a context to probe whether ex-ante IA supports institutional identity construction. Through semi-structured interviews with museum officers, this study identified four institutional objectives and mapped objectives and activities onto priority domains — Education and Creativity, Social Capital, Identity of Place, and Quality of Life — fostering a shared understanding. Findings reconceptualize IA as a reflexive governance device embedded in planning, contributing to debates on public value and sustainability.*

1. INTRODUCTION

Over the past two decades, cultural heritage has progressively moved to the centre of debates on sustainable development, territorial regeneration, and public value creation. Cultural heritage is increasingly recognized as an active driver of social cohesion, local identity, environmental awareness, and inclusive growth. This paradigm shift, consolidated through international policy frameworks and scholarly contributions, has challenged traditional approaches to cultural management and called for new tools capable of capturing the multidimensional value generated by cultural institutions and interventions (SACCO *et al.*, 2009).

Major international organizations, including UNESCO and the United Nations, now position cultural heritage as a pillar of sustainable development, contributing to community resilience, inclusion, and collective identity formation (NURSE, 2006; UNITED NATIONS, 2015; UNESCO, 2018). Within this evolving context, cultural organizations are subject to growing expectations of accountability and strategic clarity. Public authorities, funding bodies, and communities increasingly demand evidence of

impact that goes beyond visitor numbers or financial performance, encompassing social, cultural, environmental, and governance-related outcomes.
However, while the demand for impact assessment (IA) has intensified, the cultural sector continues to face significant difficulties in translating these expectations into meaningful evaluative practices. Despite this theoretical advancement, the authors observe that impact assessment remains inconsistently implemented across the cultural sector. IA is often perceived as a technical, resource-intensive, and externally imposed requirement, rather than as an internal tool supporting decision-making and learning. This fragmentation has created what the research calls an *"evaluation paradox"*: organizations are pressured to measure impact but lack the methodological and strategic resources to do so meaningfully. On the one hand, cultural institutions are urged to demonstrate their contribution to sustainable development and public value; on the other, they frequently lack evaluation frameworks that are both methodologically robust and adaptable to their organizational capacities and strategic needs. Existing approaches tend to be fragmented, mono-dimensional, or predominantly ex post, focusing on the measurement of results rather than on the processes through which impacts are generated. Therefore, evaluation run the risk of becoming a formalistic exercise, detached from governance and strategic planning. The Italian context exemplifies this paradox particularly well. While third-sector cultural organizations have increasingly been encouraged—if not required—to adopt formal impact evaluation practices, public cultural institutions, including museums and archaeological sites, still rarely integrate evaluation into their strategic processes. Even recently established or autonomous institutions often operate in the absence of formalized strategic documents, limiting their ability to align activities, objectives, and expected outcomes. As a result, they miss opportunities to link evaluation with learning, accountability, and innovation (SOLIMA, 2022; ARGANO, 2025). In such settings, IA is seldom used as a tool to support the construction of institutional identity and long-term vision.
Against this backdrop, the present paper explores the potential of IA to function not only as an accountability mechanism but as a governance-oriented tool.
With this objective in mind, researchers will refer to the SoPHIA impact assessment framework. Developed within a Horizon 2020 research project, it proposes a holistic and participatory approach to impact assessment, structured around the interrelated axes of People, Time, and Domains.
In detail, the paper focuses on the experimental application of the SoPHIA framework to Forma Urbis Museum within Celio Archaeological Park located in Rome, a recently established cultural institution characterized by high symbolic value and the lack of a formalised strategic plan of activities. Rather than focusing on the ex-post evaluation of results, the study adopts an ex-ante perspective, using the framework to support the articulation of objectives, the identification of stakeholders, and the anticipation of multidimensional impacts.

The central Research Questions (RQs) guiding the study are:

(i) *To what extent can ex-ante impact assessment support organisational objectives clarification in cultural heritage institutions?*

(ii) *How can a holistic and participatory framework contribute to the construction of strategic identity in newly established cultural organizations?*

By addressing these questions, the paper aims to contribute to the literature on cultural governance and impact assessment, arguing that ex-ante evaluation, when grounded in a holistic framework, can act as a catalyst for learning, coherence, and sustainable value creation in the cultural sector.

1. THEORETICAL FRAMEWORK

1.1. The SoPHIA framework: conceptual foundations

The SoPHIA (Social Platform for Holistic Heritage Impact Assessment) (MARCHIORI *et al.*, 2021; BAIONI *et al.*, 2021) framework was developed within a Horizon 2020 research project as a response to the growing inadequacy of traditional evaluation approaches in the cultural heritage sector. Conventional models, largely grounded in mono-dimensional and ex post logics, tend to privilege economic outputs or easily quantifiable indicators, often overlooking the complex and interdependent forms of value generated by cultural heritage interventions. In contrast, SoPHIA was conceived as a holistic framework capable of capturing the multidimensional, processual, and relational nature of heritage impacts, while explicitly supporting learning, governance, and strategic decision-making.
Rather than proposing a standardized or prescriptive model, SoPHIA is designed as a flexible conceptual architecture. Its purpose is not to identify an "optimal" evaluation solution, but to offer a shared analytical vision that institutions, policymakers, and stakeholders can adapt to different contexts, scales, and stages of intervention.

The foundations of SoPHIA lies in a convergence of debates that emerged over the past decade around cultural value, sustainability, and public accountability. Building on theoretical contributions such as the *Cultural Heritage Counts for Europe* report (2015) and subsequent ICOMOS and UNESCO reflections, the SoPHIA project addressed a central methodological gap: the absence of evaluation frameworks capable of integrating social, cultural, economic, and environmental impacts within a single, coherent perspective.
The European Commission's Transformation-16-2019 call explicitly encouraged a shift from a logic of expenditure justification ("why fund culture") to a logic of impact quality ("what effects do cultural interventions generate, for whom, and over time").
SoPHIA responds to this mandate by reframing impact assessment as a tool for understanding the transformative capacity of heritage interventions, rather than as a purely technical exercise of measurement. In this sense, impact is interpreted not only as stand-out outcome, but also as a result that is embedded in specific contexts and emerges from the dynamic relationship between actions, stakeholder perceptions and temporal horizons. This conceptual repositioning allows SoPHIA to function simultaneously as an evaluation framework and as a governance device, particularly when applied in the early stages of planning and design.

At the core of the SoPHIA framework lies a multidimensional structure articulated around three interdependent analytical axes: (1) People, (2) Time, and (3) Domains.
Their interaction constitutes the distinctive feature of the approach and underpins its holistic character.
The people axis (1) places stakeholders at the centre of the evaluation process. SoPHIA explicitly acknowledges that cultural heritage interventions generate differentiated impacts across actors with diverse, and sometimes conflicting, interests. Stakeholders are not treated merely as data providers or

beneficiaries, but as active contributors to the construction of meaning, objectives, and indicators. This participatory orientation reflects an epistemological choice: impact is understood as socially constructed and context-dependent, rather than as an objective and externally measurable phenomenon.
The time axis (2) introduces a longitudinal perspective that follows interventions across their entire life cycle. SoPHIA distinguishes between ex-ante, on-going, and ex-post phases, emphasizing that impacts unfold differently over time and that evaluation needs vary accordingly. In particular, the ex-ante phase plays a strategic role, as it supports the clarification of objectives, the alignment between actions and expected outcomes, and the anticipation of both positive and negative effects. By embedding time into the framework, SoPHIA encourages institutions to move beyond static assessments and to adopt a learning-oriented approach to planning and management.
The domains axis (3) captures the multidimensional nature of heritage impacts through a framework composed of six thematic areas and twenty-eight sub-themes. These domains encompass cultural, social, economic, environmental, governance, and well-being dimensions, reflecting the intersectoral reach of cultural heritage interventions.
Importantly, the framework explicitly accounts for cross-cutting effects and counter-effects, inviting institutions to consider synergies, trade-offs, and unintended consequences. Domains are not intended as a checklist, but as a reference structure that must be selectively adapted to the specific context and objectives of each intervention (MARCHIORI *et al.*, 2024).

Furthermore, SoPHIA strengthens transparency and legitimacy by providing a structured narrative of value creation that can be communicated to funders, policymakers, and the public. Its holistic orientation aligns evaluation practices with broader sustainability agendas and public value frameworks, reinforcing the role of cultural heritage institutions as active agents of social, territorial, and environmental development.

In sum, the SoPHIA framework represents a conceptual and methodological shift in cultural heritage impact assessment. By integrating People, Time, and Domains within a flexible and participatory architecture, it enables ex-ante evaluation to operate as a strategic governance tool, capable of guiding decision-making, supporting institutional identity, and enhancing the long-term sustainability of cultural interventions.

2. METHODOLOGY

2.1. Research design and methodological approach

The research adopts a qualitative (YIN, 2015) and participatory methodological approach (BERGOLD & THOMAS, 2021), consistent with the epistemological assumptions underpinning the SoPHIA framework. Rather than conceiving IA as a detached measurement exercise, the study is configured as a form of research-intervention, in which evaluation becomes an integral part of organizational reflection and strategic construction (Marchiori et al.,2024).
This approach is particularly suited to ex-ante applications, where objectives, actions, and expected impacts are not yet formalized and must be progressively articulated through interaction between researchers and institutional actors.

The choice of a qualitative design responds to the exploratory nature of the research questions and to the need to capture meanings, perceptions, and strategic intentions that cannot be adequately addressed through standardized quantitative indicators.

2.2. Case selection and contextual analysis

Forma Urbis Museum and Celio Archaeological Park were selected as case studies due to a combination of contextual and organizational characteristics (DEMARTINI *et al.*, 2024) that make them particularly suitable for testing the ex-ante potential of the SoPHIA framework. Both are embedded in a historically and symbolically dense urban context, characterized by high tourist flows, strong cultural stratification, and a complex network of local stakeholders (CIPRIANO & DEMARTINI, 2025a, 2025b). At the same time, the recent institutionalization of the Forma Urbis Museum implies the absence of consolidated strategic planning documents, such as formal mission, goals and objectives statements or strategic plans. Rather than representing a limitation, this condition constitutes a critical analytical opportunity: it allows impact assessment to be used as a generative tool for strategy-making, rather than as a mechanism for evaluating pre-defined objectives. In this sense, the case offers an ideal setting to explore whether and how ex-ante impact assessment can support the construction of strategic identity in cultural institutions.

2.3. Application of SoPHIA

The application of the SoPHIA framework followed the methodological guidance provided by the SoPHIA Toolkit (SOPHIA CONSORTIUM, 2021), which emphasize the need to make explicit, context-sensitive choices along the three analytical axes of People, Time, and Domain. These choices were not treated as purely technical decisions, but as substantive moments of strategic reflection.

With regard to the People axis, the initial phase of the research focused on the involvement of the institutional actors directly responsible for the activities of Forma Urbis Museum. Through three semi-structured interviews with museum's public officers, the research team reconstructed the implicit objectives of the institution, the activities already undertaken or planned, and the intended beneficiaries of these actions. The inclusion of external stakeholders was intentionally postponed to later phases of implementation, in order to first consolidate an internally coherent strategic framework.

The Time axis was operationalized by explicitly distinguishing between activities already in progress and actions planned for future development. This distinction enabled the integration of two evaluative logics within the same framework: an in-itinere perspective for ongoing initiatives and an ex-ante perspective for activities still in the design phase. Emphasis was placed on the ex-ante dimension, using impact assessment to anticipate expected outcomes, identify potential risks and trade-offs, and verify the coherence between strategic intentions and operational choices.

The Domains axis was addressed through the selective adaptation of the multi-domain framework composed of six thematic areas and twenty-eight sub-themes (see Fig. 1). Rather than applying the framework in its wholeness, the research team worked collaboratively with institutional actors to identify the domains most relevant to the specific objectives (later will be discussed) and context of Forma Urbis Museum. This process involved mapping each identified activity in the selected domains and sub-themes, with attention to cross-cutting effects, synergies, and possible unintended consequences.



Fig. 1. Themes and sub-themes of SoPHIA method.
Source: Marchiori et al., 2024 (p. 21)

2.4. Data collection and analytical process

Data collection relied primarily on semi-structured interviews, supported by documentary analysis of available institutional materials and contextual data. The interview guide was constructed as an operational translation of the SoPHIA framework, with questions explicitly aligned to the selected domains and sub-themes. This structure allowed respondents to reflect not only on what the institution does, but on why specific actions are undertaken and what kinds of impacts they are expected to generate.

Following data collection, the research team synthesized the results into an impact map linking objectives, activities, beneficiaries, and domains of impact. This map was subsequently discussed with the public officers in a validation phase aimed at verifying the accuracy of the reconstructed objectives, their prioritization, and the completeness of the identified impact areas.
This iterative process reinforced the participatory nature of the evaluation and contributed to the emergence of a shared strategic narrative.

3. FINDINGS: EX-ANTE IMPACT ASSESSMENT AS A CATALYST FOR PLANNING

By proceeding systematically, the first phase of the research involved attempting to gather documentation from the museum regarding its objectives and planning.

The ex-ante application of the SoPHIA framework to Forma Urbis Museum generated a set of results that extend beyond the identification of expected impacts. The findings indicate that the IA process itself acted as a catalyst for strategic identity construction, organizational learning, and governance clarification, particularly in a context characterized by the absence of formal planning instruments.
In response, the research team decided to conduct three semi-structured interviews with the museum's public officers. These conversations proved crucial in reconstructing the institution's mission, identifying both general and operational objectives, and mapping the intended beneficiaries of different actions.

The qualitative insights generated from these interviews served as the raw material for aligning the institution's activities with the SoPHIA model. Through this collaborative process, researchers and practitioners jointly created a coherent map of expected impacts. This exercise not only clarified the museum's objectives but also revealed the complex web of relationships linking specific activities to broader social, cultural, economic, and environmental outcomes. The act of mapping impacts itself emerged as a learning tool: by explicitly relating actions to consequences, the institution gained greater clarity about its role in the community and the pathways through which it could create value.

3.1. Explicit articulation of the museum's objectives

One of the most significant outcomes of the ex-ante assessment process was the progressive clarification of the museum's mission and strategic objectives. The structured dialogue enabled by the framework required institutional actors to articulate, justify, and prioritize their objectives in relation to specific activities and intended beneficiaries.

The following logical flow was adopted:

- Activities implemented, ongoing, or planned were identified and analysed to determine their promoters, specific objectives, and intended beneficiaries.
- This analysis enabled a systematic reflection on the relationships between individual activities, specific objectives, and broader organisational objectives.
- Accordingly, each general objective was articulated into a set of specific objectives associated with beneficiaries and achievable through instrumental actions and activities.

This process led to the emergence of a more coherent strategic narrative, in which Forma Urbis Museum was increasingly defined not only as a site for the preservation and display of an exceptional archaeological artifact, but as a platform for knowledge production, education, and territorial engagement. The explicit linking of objectives to domains of impact encouraged a shift from activity-based reasoning ("what we do") to purpose-oriented reasoning ("why we do it and for whom").
So, through semi-structured interviews conducted with public officers of Forma Urbis Museum and Celio Archaeological Park, four overarching objectives were identified:

- Support and promotion of archaeological research;
- Transmission of historical memory;
- Conservation and enhancement of the preserved heritage;
- Strengthening the relationship with the local neighbourhood.

3.2. Alignment between actions and expected impacts

A second key finding concerns the clarification of the relationships between actions, beneficiaries, and expected impacts. Through the construction of the impact map, institutional activities—both ongoing and planned—were systematically connected to selected impact domains and sub-themes of the SoPHIA Model. This exercise revealed areas of strong alignment, as well as gaps and overlaps that had previously remained unexamined.
More specifically, the general and specific objectives emerging from the dialogue with museum officials were found to be predominantly distributed across four domains of the SoPHIA framework: Education and Creativity, Social Capital, Identity of Place, and Quality of Life.

In particular, the ex-ante analysis highlighted how some planned initiatives carried implicit expectations of social, educational, or territorial impact that were not yet supported by corresponding operational choices. Making these ambitions explicit allowed public officers to reflect on the adequacy of existing resources, partnerships, and governance arrangements. In this sense, impact assessment functioned as an anticipatory tool, enabling the institution to identify potential misalignments and adjust strategic intentions before implementation.

3.3. Emergence of a shared understanding among the museum's public officers

The participatory nature of the ex-ante assessment process contributed to the development of a shared understanding of the museum's role and priorities among the museum's officers involved in the research. The interviews and validation moments created a structured space for dialogue in which different perspectives could be discussed. Rather than producing consensus through simplification, the framework helped surface differences in emphasis and interpretation, making them available for collective reflection.
Evaluation, in this context, was not perceived as an external judgment but as a reflective practice embedded in everyday management. The findings suggest that this dimension is particularly relevant for newly established institutions, where roles, boundaries, and strategic horizons are still in formation.

Finally, the findings indicate that the ex-ante application of the SoPHIA framework supported a reframing of IA from a technical requirement to a governance and learning mechanism. By integrating People, Time, and Domains into a single analytical process, the framework enabled museum's officers to consider the long-term implications of the museum overarching identified objectives and to situate individual activities within a broader trajectory of development. Rather than producing definitive answers, the assessment generated structured questions that can inform future decision-making, monitoring, and stakeholder engagement.

4. DISCUSSION

The findings from the ex-ante application of the SoPHIA framework to Forma Urbis Museum provide empirical support for a reconceptualization of IA as a governance-oriented practice in the cultural heritage sector. Rather than functioning solely as a tool for accountability or retrospective measurement, the framework operated as an organizational device capable of structuring reflection, clarifying priorities, and supporting organisational objectives clarification.

This function is particularly relevant in public cultural institutions, where strategic planning is often fragmented across administrative, scientific, and political domains. The Italian context illustrates this tension clearly. Third-sector cultural organizations have been pushed to adopt formal impact evaluations, while public cultural institutions—including museums and archaeological sites—still rarely integrate evaluation into their strategic processes. Even autonomous State Museums that have modernized in other respects tend to operate without consolidated strategic planning frameworks. As a result, they miss opportunities to link evaluation with learning, accountability, and innovation (SOLIMA, 2022; ARGANO, 2025).

In this sense, impact is interpreted not only as an outcome, but as a dynamic relationship between actions, stakeholders, and temporal horizons. In this sense, impact assessment becomes a space of governance, where choices are discussed and legitimized through structured reflection.

So, the research highlights several important findings.
First, the process of assessment itself functions as a learning tool. By explicitly linking actions to consequences, the institutional organization gains greater self-awareness about its role within the local community and the value it produces.
Second, IA enhances organisational objectives alignment by translating general aspirations into measurable and stakeholder-oriented goals.
Third, it improves communication and transparency, building credibility with funders, policymakers, and the public. In this sense, IA contributes to what the authors describe as a "reflexive turn" in cultural management, where evaluation becomes a participatory and formative process rather than a bureaucratic requirement.

5. CONCLUSIONS AND LIMITATIONS

One of the most significant contributions of the SoPHIA framework lies in its capacity to reposition impact assessment within organizational governance and planning processes.
When applied ex ante, SoPHIA does not merely assess expected impacts; it actively supports institutions in articulating their mission, priorities, and strategic identity. By requiring organizations to make explicit connections between objectives, actions, stakeholders, and domains of impact, the framework fosters internal coherence and reflexivity. This is particularly valuable for newly established cultural institutions or for organizations lacking formal strategic documents, as the evaluation process itself becomes a space for collective sense-making and strategic construction. In this perspective, impact assessment functions as a catalyst for organizational learning, rather than as an external accountability requirement.

At the same time, the findings highlight important limitations.
First, the application of a holistic and participatory framework is resource-intensive, requiring time, expertise, and organizational commitment that may not be readily available in all contexts. Without adequate support, there is a risk that impact assessment becomes a formalistic exercise designed merely to satisfy funders. Moreover, the choice of indicators remains a delicate issue: quantitative metrics such as visitor counts are often insufficient to capture deeper forms of cultural and social value. The authors

warn against the tendency to prioritize "what can be measured" over "what matters," which could distort institutional priorities and underrepresent the transformative power of cultural engagement. These limitations do not undermine the value of the approach but point to the need for adaptive and context-sensitive applications.

By demonstrating how ex-ante IA can support strategic construction, this study contributes to ongoing debates on public value in the cultural sector. The SoPHIA framework operationalizes a multidimensional understanding of value that resonates with sustainability agendas. Impact assessment, in this perspective, becomes a means of directing cultural organizations toward socially desirable outcomes, rather than merely measuring their performance.

In conclusion, the paper argues that the integration of impact evaluation into planning may represent a path toward more sustainable, transparent, and socially responsive cultural organizations. Rather than a one-size-fits-all model, IA should be treated as a flexible and adaptive process tailored to institutional capacities and contexts. When implemented thoughtfully, it aligns operational choices with societal goals, reinforces stakeholder trust, and supports the long-term sustainability of cultural institutions as active agents of development and innovation.

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