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Arts and
Humanities
Research Council



ART IS EVERYWHERE

Collaborative Place Based Knowledge Exchange

VALUED

DEFINING AND MEASURING

VALUE IN HUMANITIES

AND ARTS-INFORMED

PLACE POLICIES AND

PRACTICES

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FOREWARD

THINKING DIFFERENTLY ABOUT THE HEALTHY IMPACT OF THE ARTS

This is an Arts and Humanities Research Council (AHRC) impact initiative for North Lanarkshire's *Art is Everywhere* transdisciplinary place-based project – positioned at the intersection of the arts, humanities and health policy.

Informed by an existing research programme called *Measuring Humanity*, this community-led initiative has used arts and humanities approaches to connect hyperlocal community members across the life span and socioeconomic spectrum to multiple sectors, policymakers, practitioners, town planners and commissioners.

After almost a year (2022 – 2023) of local community engagement and in-depth discussions with the AHRC's Place-based network of 9 Knowledge Exchange (KE) projects led by Prof Rebecca Madgin, *Art is Everywhere* is troubling the concept of value.

valYOUed is an AHRC legacy and impact project from Art is Everywhere. Marisa de Andrade is the Principal Investigator for both projects, author of the Foreward and Editor of this report. Helen Berry, Christina McMellon & Mary Ann Powell are authors of the overall report content. We thank contributors and those who reviewed earlier drafts for their insightful contributions. Design elements for the report were prepared by Rhiannon Bull. The infographic illustrator and designer is Jenny Capon.



Through our follow-up consortium hub award [REALITIES led by the AHRC's Health Disparities Programme](#), we've started deeply engaging with health economists to make sense of how our place-based work connects emotional value to economic value to address health inequalities.

Together, we're [mobilising community assets to tackle health inequalities](#).

Our research suggests that by unpacking and critically analysing foundational concepts such as value during the research design, measurement and evaluation phase

WHAT ARE WE DOING WITH THESE INSIGHTS?

In (health) economics, there are clearly defined toolkits with clearly defined processes and analytical techniques; clearly defined pathways and 'maps' that lead you to particular calculations that then lead you to the value, worth, efficacy or safety of a project, pill or intervention.

But what does value or efficacy or safety mean for community-based projects that seek to improve health and wellbeing through the arts and humanities? Is it possible to measure the value – costs, benefits, outcomes – of an arts or humanities-informed community-based project using the techniques and definitions that health economists use?

A key consideration for any research intended to be accessed and made use of

of health economic modelling, we might end up with very different pathways for defining and measuring value for money; (social) return on investment; costs versus benefits; prioritisation of services and investments; efficiency and evidence.

When linked to arts and humanities data from our 9 KE place-based projects, this in turn helps us create new pathways and insights for defining and measuring the value of ['individual and collective life experiences, emotions, meanings, and memories'](#).

by individuals and organisations outside the academy is exactly how to make this research more widely available. Often a 'toolkit', typically conceived as a more accessible guide to the resources (such as case studies, how-to guides, or creative work) that accumulate over the course of a project, is produced as a final piece of KE work.

However, by paying attention to the methods used to collate and present resources (such as a 'toolkit'), to the utility of these resources to the intended audience(s), and to intended modes of dissemination for these resources, we may discover opportunities to adapt or even completely reconceive of what is currently most valuable to intended audiences outside of academia.

WHAT ARE WE DOING THAT'S OF VALUE TO COMMUNITIES?

We conducted scoping work reviewing academic and grey literature produced on this topic, assessed toolkits recently produced to disseminate research findings, and engaged with the intended audiences of these toolkits to assess their value. This included a literature review, 'toolkit analysis' and interviews about 'toolkits' and their creators and users, specifically in relation to value.

Through this, we troubled the concept of value in our work and attempts for researchers to showcase their work through 'toolkits'.

We were mindful of rather narrow definitions of value when applied to health and wellbeing usually linked to:

- direct costs (eg. healthcare resources; staffing; consumables; overheads; capital; community, ambulance and voluntary services; costs incurred by patients and their families; inputs to treatments)
- indirect costs (eg. time of patients or their families lost from work; lost production and earnings and the value of indirect cost is the value of the lost production); and
- intangible costs (eg. the pain and suffering associated with treatment).

What about the other intangible aspects of the human experience that we know cannot be measured? For example, diverse subjective realities; personal and even subconscious motivations?

We created space to explore the value and use of 'toolkits' on how to capture, measure

and 'showcase' these felt experiences. We're in agreement that these are important resources to demonstrate the value of our work and help put these arts and humanities approaches into practice, though we're also grappling with the volume of outputs out there for local and national organisations to understand and apply.

Measuring Humanity is itself a 'tested' methodological and evaluation framework that calls for a re-conceptualisation of the evidence-base to include crucial forms of creative and relational data about communities' lived experiences that cannot be accessed through biomedical or reductionist approaches to generating and using evidence. It is one of many 'toolkits' available for researchers, practitioners and policymakers, but there are many divergent 'toolkits' available in this space sometimes saying similar things and at other times offering contradictory insights.

How are practitioners, policymakers and researchers to know which toolkit they should be using? What are they trying to say, to whom and for what purpose? And how – in 'real' world, community settings – can we redefine and apply value to place-based contexts?

'Unpacking toolkits: 'Giving someone tools doesn't make them a carpenter' written by Helen Berry, Christina McMellon & Mary Ann Powell, and illustrated by Jenny Capon is what materialised.

I hope you find it valYOUable.

[Marisa de Andrade](#)

UNPACKING TOOLKITS

"GIVING SOMEONE TOOLS
DOESN'T MAKE THEM A
CARPENTER"

HELEN BERRY, CHRISTINA MCMELLON
& MARY ANN POWELL

27 OCTOBER 2023



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1 INTRODUCTION

Toolkits have been produced across a range of disciplines and sectors for many years. Increasingly, academics are producing toolkits at the conclusion of research projects. These provide an accessible guide to the processes, approaches and resources used within the project, enabling communities and others to access and benefit from the research in the work they do. This scoping project is intended to create space for academics to think critically about the creation of toolkits, specifically in the context of working with communities.

A rapid scan of the literature relevant to toolkits produced a large number of results. However, for the most part, the literature identified tended to relate to specific toolkits, within particular precise contexts. There was a dearth of literature addressing the concept of toolkits more broadly. It is worth noting that the lack of consistent terminology related to and definition of toolkits, and the wide range of different disciplines that use toolkits, means that there may well be literature which was missed in such a rapid scan.

This report presents the findings and insights gained from the scoping project, focused on the concept, use and value of toolkits, conducted for the AHRC in collaboration with the Binks Hub, University of Edinburgh. Conducted from January to April 2023, the project drew on a review of toolkits, including the creation of a table of key features and attributes, and four conversations with the creators and users of toolkits, to problematise and critically explore the notion of toolkits.





2 METHODOLOGY

The overall aim of the project is to look critically at the concept, use and value of toolkits for working with communities, from multiple stakeholder perspectives (recognising that individuals may also hold multiple perspectives with identities encompassing creator and user of toolkits, researcher and practitioner). To achieve this, the following research questions were addressed:

- What is a 'toolkit'? What do different stakeholders expect from a 'toolkit'?

- What is the value of a toolkit, from the perspective of different stakeholders, including toolkit creators, researchers and community-based practitioners?
- What are the factors (related to context, user and resource) that challenge or enable engagement with and effective use of toolkits?

A two-pronged approach was used to collect and analyse evidence to address the research questions.

2.1 REVIEW OF A SELECTION OF TOOLKITS

The first step involved collecting and exploring a selection of toolkits. A sample of twelve toolkits were selected for review. The sample was not intended to be representative, however, the focus of each toolkit was relevant to the work of the AHRC and the Binks Hub. Initially eight were included, drawn from a selection collated by the AHRC and the Binks Hub as of interest. A further four toolkits, discussed in conversations with toolkit creators and users, were subsequently added. Toolkits that were included met the following selection criteria:

- Intended for supporting working with communities either directly or indirectly **AND**
- Relevant to at least one of the AHRC and/or the Binks Hub's three priority themes; health inequities, place-based communities, and methodological innovation **AND/OR**
- Created or used by participants in

conversations we held.

The toolkits were collated and mapped in an Excel database, then codified according to a) an emergent understanding of the differentiating and common features, components and elements, and b) critical questions that evolved and were informed by the process of unpacking toolkits. This unpacking subsequently informed critical questions we went on to ask of toolkit creators and users.



2.2

ENGAGEMENT WITH TOOLKIT CREATORS AND USERS

The most substantial component of this project was the second step, engagement with toolkit creators and practitioners in order to capture stakeholder perspectives and ground the report in stories of production and use.

Conversations were held with toolkit creators and practitioners who were toolkit users, to explore the research questions. Participants were all connected with the 'Active and Creative Communities Arts Development' research project led by Marisa de Andrade, who is also a Director of the Binks Hub.

Two conversations were held with toolkit creators in March 2023. The first included eight participants, all currently university-based researchers with experience in developing toolkits with communities. The second conversation, with three participants, focused on a 'how to' practical guide sharing the Human Learning Systems (HLS) approach. This conversation included one of the creators of HLS and users of the resource from the AHRC and/or the Binks Hub. Two further conversations were held, in April 2023, with practitioners who have experience using toolkits in their work. The first of these was with two practitioners working at a youth-led organisation, who had experience using a variety of toolkits in their work with young people. The second was with a practitioner developing creative education programmes, who had experience using the HLS approach as well as a range of other creative toolkits.

Prior to the conversations, participants were sent a briefing paper, outlining the findings of our initial exploratory review of toolkits. Participants in the first conversation (researchers who have developed toolkits) were also sent a template with questions about the toolkit they had been involved in creating or using and invited to fill this in prior to meeting. This was used to prompt reflection prior to, as well as generate discussion when meeting in person. Potential conversation participants were identified through the AHRC's place-based programme, the Binks Hub, and the research team's networks and invited to participate. Prior to meeting they were provided with information about the project and the purpose of the conversations. All participants provided written consent for the use of the discussion and findings in this report.

The findings from the toolkit review and conversations were then synthesised to identify emerging themes and key insights. This report presents those findings. First is a discussion of the combined themes from the toolkit review and conversations, followed by a deeper look at the 'stories' of four toolkits, and then our reflections and conclusions.



3 KEY THEMES

3.1

WHAT IS A TOOLKIT?

It is clear from talking with toolkit creators and users, as well as scanning the literature and a selection of toolkits, that the language, concept and understandings about toolkits, vary greatly. The unifying factor is the perception of toolkits as a resource, for informing some purpose, such as implementing an activity or intervention. This usually includes a collection, or curation, of 'tools'. Theole et al. (2020), for example, describe a toolkit as "a collection of adaptable documents to inform and facilitate implementation" (p.1). However, not all such collections are called 'toolkits' and, perhaps more surprisingly, not all resources explicitly called 'toolkits' contain implementation 'tools'.

THE LANGUAGE OF TOOLKITS

The variance in language related to 'toolkits' was evident in the selection of resources we reviewed and raised by participants at the outset of all the conversations.

While the resources we included in the toolkit review fit the description of being a resource that includes a collection or curation of tools to inform implementation, some were explicitly identified as a toolkit, others as 'guide' or 'guidebook', and 'resource'. Participants also talked in terms of 'guidance' and about 'resources', 'manuals', 'how-to guides' and 'playbooks', noting that the latter was around a lot at present and seemed to be a 'trendy' term. Playbooks were considered more flexible

than toolkits, containing suggestions illustrated with examples or vignettes, rather than more prescriptive directions or orders.

The different language used seems to reflect the different ideas and assumptions that people have about toolkits. Interestingly, some participants expressed a reluctance to use the term 'toolkit'. While academics often consider that toolkits are a way of making their work accessible,

one researcher was hesitant to use the term, noting that some toolkits can be a bit 'highbrow' and have 'a condescending tone', showcasing what has been done and telling people what to do. The toolkit this researcher was involved in developing intentionally used language of 'resources', rather than 'toolkit'. Practitioners also talked in terms of using 'resources', rather than actively seeking out toolkits. While they used a range of toolkits in their work, they were clear that they were not always looking specifically for 'toolkits', but were often looking for resources in relation to

new work they were doing, which would give them tools or reliable information to use. In a sense, practitioners were building their own 'toolkit', made up of a variety of tools and resources that they had selected from different sources.

There is a sense from the conversations we had that the language of 'toolkits' is somewhat constrained and limited. For both creators and practitioners, 'toolkits' were perceived as not quite responding to the contextual nuances of what might be needed by different users.

THE PURPOSE OF TOOLKITS

So, what is the purpose of a toolkit? Toolkits tend to either provide i) guidance, focusing on why to use a particular methodology or types of methods; ii) tools, for how to do something, such as printable templates, such as checklist, run sheets, techniques etc; or iii) a mixture of guidance, tools and "everything in between" (Hanson, 2018a).

Toolkits that offer 'guidance' may be more abstract and not suggest any actions, whereas a 'tool' for action may be more practical, but not provide reasoning for the suggested action. Hansen (2018) notes that calling both of these a 'toolkit' can be confusing and inaccessible.

A key feature identified by conversation participants was the practical nature of toolkits. This too was reflected in the language, for example, toolkits were described as providing a 'how-to' or 'hands on' guide. Toolkit creators emphasised the need for toolkits to be practical and accessible in order to be of use to the community they are designed to serve, containing ideas to apply and an explanation of the approach. Practitioners also highlighted the practical nature, making a distinction between frameworks and toolkits. Frameworks were seen to inform practice and both the literature and our brief scan of toolkits suggests these can

be part of a toolkit, but from a practitioner perspective, a framework alone does not necessarily provide what is needed to do that practice. Toolkits are more pragmatic and practical, with things that can be done, such as activities, exercises, quizzes etc.

Our exploratory review of community engagement toolkits found that the vast majority of these had some information about the why of using a particular approach, including the underpinning principles and overarching methodology. However, only around half contained tools, for how to do something. Further, practitioners were clear that in looking for resources they were wanting suggestions, rather than toolkits that were prescriptive in approach.

Conversation participants noted that what people want from a toolkit can be quite different and one of the keys to toolkit

effectiveness is a good match between the user and the purpose. Looking at who has created the toolkit and who it has been created for shines a light on the purpose of the toolkit. While toolkits are generally produced for particular audiences or users, this is not always explicitly stated and the extent to which they are grounded in a specific context varies. Some toolkits seem to have a more clearly thought through and articulated case for use, whereas others can appear more specifically grounded in and directly referential to work that they are communicating.

Some of the toolkits that we reviewed indicated that communities had been involved in the toolkit production.

Sometimes this was very clear, with the toolkit being co-authored following community engagement, or involving named partners and/or advisory groups, other times it was implied that communities had been involved, but there was little detail to explain the nature of that. Inclusion of communities in development was highlighted in the conversations we had, for example, with the contribution from case study authors being an invaluable part of the HLS practical guide and recognition from other toolkit creators that the vision for the toolkit is linked to knowing the audience it is intended for and what it is they are wanting.



THE CONTENT OF TOOLKITS

Part of the beauty of a toolkit for users lies in its practicality. Practitioners told us that having a toolkit does not necessarily mean that it is prescriptive or followed exactly,

but it means that they are not starting with a blank page. Rather, there is a sound basis, which can spark ideas and offer tools for consideration and selection.

“ ... tools can be useful but should not be relied upon as a magic formula and the act of choosing and applying them is the most crucial step ... a wise and skilled selection, combination, and implementation of multiple methods is inextricably linked with the purpose to which they will be applied.” (Hanson, 2021)

Our exploratory review of community engagement toolkits shone a light on the variation in the form, structure and content of toolkits. Toolkits range in size and format, incorporating digital and analogue (non-digital) formats and tools such as text, visual images, slide decks, films, podcasts,

websites and interactive elements. Multiple formats can be included in toolkits, with signposting to direct users to other resources, including links to related webpages. Toolkits can include all or some of the following components, in varying levels of detail and contextualisation:

APPROACH

Explanation of the approach, such as the overarching methodology and why to use it, and the principles and theory that underpin the toolkit.

FRAMEWORK & GUIDE

Guidance on or a sequence of steps showing how to go about undertaking the activity.

TOOLS

Practical tools and resources that can be used for doing the activity/intervention, standalone instruments, devices, instructions or techniques for implementation.

GUIDANCE & ADVICE

On how to a) implement the toolkit ('tips'), b) ensure readiness and/or applicability to context, c) match or adapt the toolkit to setting and context.

SIGNPOSTING

To guide users on navigation internally within the toolkit and to appropriate external resources and support.

CASE STUDIES & ILLUSTRATIONS

Local examples that demonstrate the use of the resources and/or indicate adaptability and transferability.



Participants who had created toolkits talked about the importance of including practical examples of implementation. This includes incorporating reflections on when things do not go right, to give users some

confidence and reassurance that when things do not go according to plan that does not necessarily mean that it is a failure of the process.

“Toolkits that have different options can be really helpful. Don’t be afraid of talking about failure.” (Conversation participant)

3.2

HOW AND WHY ARE TOOLKITS DEVELOPED?

Participants in our conversations who have created toolkits noted that to meet the needs of the users that users themselves needed to be engaged in development. Peer to peer learning and dynamic components were features that support user engagement.

However, considerable time is involved in doing this. Frequently created as outputs or end products of a project, toolkits reflect what was learned along the way, rather than what creators thought it might have been at the beginning. But participants noted that the need to demonstrate impact very quickly for reporting purposes (for example, to funders) meant that there is often no space for knowing whether the toolkit is working effectively.

Toolkits aim to contribute to bringing about change, including by making academic knowledge accessible and relevant to others. However, toolkit creators also noted that all too commonly in academia the idea of a toolkit is associated with needing to produce a (non-academic) outcome, often to meet funding or commissioning requirements. In reverting to production of a toolkit as an outcome, it risks becoming something of a box-ticking exercise, with releasing

yet another resource into an already crowded space. Participants suggested it potentially contributed to poor examples of toolkits and careless application of these, damaging the concept of toolkits.

A concern for toolkit creators, expressed in our conversations, was the sustainability and longevity of toolkits. All too often for academic researchers, toolkits are associated with particular projects, then when the project ends there is uncertainty about where to house the toolkit or it may be housed somewhere that potential users are not able to find it. Toolkits may usefully facilitate peer to peer learning, or have a vital dynamic component with user involvement, but once the project ends and there is no funding, there is nothing in place to sustain that. For toolkit creators, finding somewhere to anchor or house a toolkit can provide an opportunity for dynamism and longer life for a worthwhile resource.





3.3

WHAT IS THE VALUE OF A TOOLKIT FOR THE USER?

Conversations with participants highlighted the value of toolkits in providing exposure and access to ways of both *thinking about* and *doing things*.

This is illustrative of the importance of the toolkit purpose being relevant to the people who were using it. All the toolkit users talked about feeling affirmed in some way by the resources they used. The HLS practical guide was highlighted by a user, for example, as resonating with and further informing their thinking, providing a platform for experimenting with doing things differently that was proving successful for learning and programme development (see toolkit story, Human Learning Systems: A practical guide for the curious). Practitioners who have used other resources talked about these reaffirming that they were doing things the 'right' way and that they were not letting their own bias come into or cloud it.

Participants also highlighted the value of toolkits for use in practice doing things. Community practitioners talked about toolkits providing a resource for particular activities, which were aligned with their purpose and affirmed the approach they were taking. Particular value in this was linked to the organisation's capacity, as they had limited funding and time available to spend on developing or searching for resources. It was therefore hugely helpful

to be able to access an existing external resource that was tried and tested, where the research had already been done and the resource could be adapted to their particular context for use, without the need to start from scratch developing something.

A key challenge for community practitioners was ensuring that the resource is robust. Emphasis was placed on the developer of the resource being reputable. For example, the toolkits they used were those developed by people who were experts in that area, funded by reputable funders, and/or produced or promoted by registered charities or membership organisations that are regulated in some way. Interestingly, universities were considered reputable, but were not the first port of call for practitioners. They had found that academic level toolkits were not always accessible, describing them as sometimes being too difficult to apply in their own context and/or requiring evaluation that did not suit the mode of delivery. They were more likely to turn to third sector umbrella organisations first, rather than universities.

Interestingly, some of the toolkits used by practitioners, and created by sources identified by them as reputable, were largely collections of tools, such as 'lesson plans' and activities that could be used, with very little explicit articulation of underpinning principles and values, or overarching methodology. The acceptance and use of these toolkits thus appeared

to be something akin to a 'sponsorship of trust', whereby trust in the toolkit developer provided a sense of trust and confidence in the resource. This is very different from the HLS practical guide, in which the HLS paradigm is deeply and explicitly embedded, and provides something of a bridge between the paradigm and enacting the approach.

3.4

WHAT CONDITIONS ARE NEEDED FOR MAKING EFFECTIVE USE OF TOOLKITS?

The context in which a toolkit is going to be used creates conditions which can support and facilitate, or conversely challenge, the use of it.

The purpose of using the toolkit needs to be resonant within the context, and this understanding may be shared or contested. During the conversations, participants identified a range of personal and relational conditions that are required for using toolkits effectively. A key condition identified was agency, in that individual users of toolkits need to be self-motivated and directed enough to use the resource (see toolkit story, Cross-pollination Resource Pack), and have sufficient control over their actions within their own context to be able to implement the toolkit (see toolkit story, HLS: A practical guide for the curious). The HLS approach suggests that the desire for change is driven by dissonance within the current context, but that there needs to be a permissive space and connection with allies in the workplace, including leaders and people in

positions of power, to enable change to be implemented.

Researchers who had created toolkits reflected that there is often an assumption on the part of academics that people are not going to want to read a lot and therefore toolkits need to be kept simple. But their experience suggests that the people who are likely to use the toolkit and find it useful are those who are already engaged and might be expected to want to read more deeply. People will pick out what they need, described by one toolkit user as using a "pick and mix" approach (see toolkit story, Dove body image toolkit). This raises the question of whether all toolkits lend themselves to this kind of selective 'dipping in' approach or whether the conceptualisation of some is such that these need to be engaged with in their



entirety, and the parts are not intended to stand alone.

Other conditions necessary for effectively using toolkits included having the necessary level of skill to use the tools. Researchers favoured an approach that includes some methodological context explaining the approach, the tools for doing it and “scaffolding” or training

to ensure that users are then able to implement it. This included anchoring the resource in terms of the purpose, so that users’ expectations are oriented toward appropriate use. Including ethics and values in toolkits was seen as important, but also difficult to achieve. Overall, tools alone were not seen as sufficient, and unskilled use was recognised as being potentially dangerous.

**“Giving someone tools doesn’t make them a carpenter.”
(Conversation participant)**

The practitioners made the point that their team did not blindly use a toolkit, but brought to the table their considerable work, education and life experience and skills, along with an analytical eye, in making judgements about which toolkits, tools or approaches they would use in particular contexts.

The context in which the toolkit will be used is a critically important consideration for both toolkit creators and users. Conversation participants described the importance of toolkits for organisations which are starting up and developing. There was recognition that sometimes

toolkits allowing for replication of a process are useful, while at other times what is needed are tools that are easily adapted for context. Practitioners emphasised the need for quality assurance and ensuring that the toolkit meets the particular need and/or can be adapted to do so.

Practitioners also noted that they are often looking for resources, but there is so much information ‘out there’. They suggested that it could be useful to have some kind of directory, which included collated toolkits with reviews and opportunities for ongoing collaboration so that people could share their knowledge and experiences.

3.5

WHAT TENSIONS ARE EVIDENT IN THE CREATION AND USE OF TOOLKITS?

Several areas of tension were uncovered through the discussions. One area of potential tension sits at the intersection of the paradigm the toolkit sits within and the actual implementation of the approach.

Essentially, users want toolkits or how-to guides of some description, despite the limitations of these. Even those working in paradigms centred on intuitive and creative thought want instruction on how to proceed. This is evident, for example, with the HLS approach. There is a paradox in that the HLS approach encourages thinking differently, critical learning, experimentation and continuous reflection, but some kind of toolkit was called for by people engaging with the ideas. Users did not necessarily have the time or space for radical thought and wanted something to help them engage with the process and move forward confidently. The HLS practical guide for the curious is intended as a heuristic device that bridges that tension, explicitly addressing the fluid, complexity-informed paradigm and providing an outline of how to engage with a set of processes, providing a spread of tools without dictating how those should be used in any/every context. However, the focus is on addressing the how to use the HLS approach, providing signposting to where users who are interested can read about why use this approach.

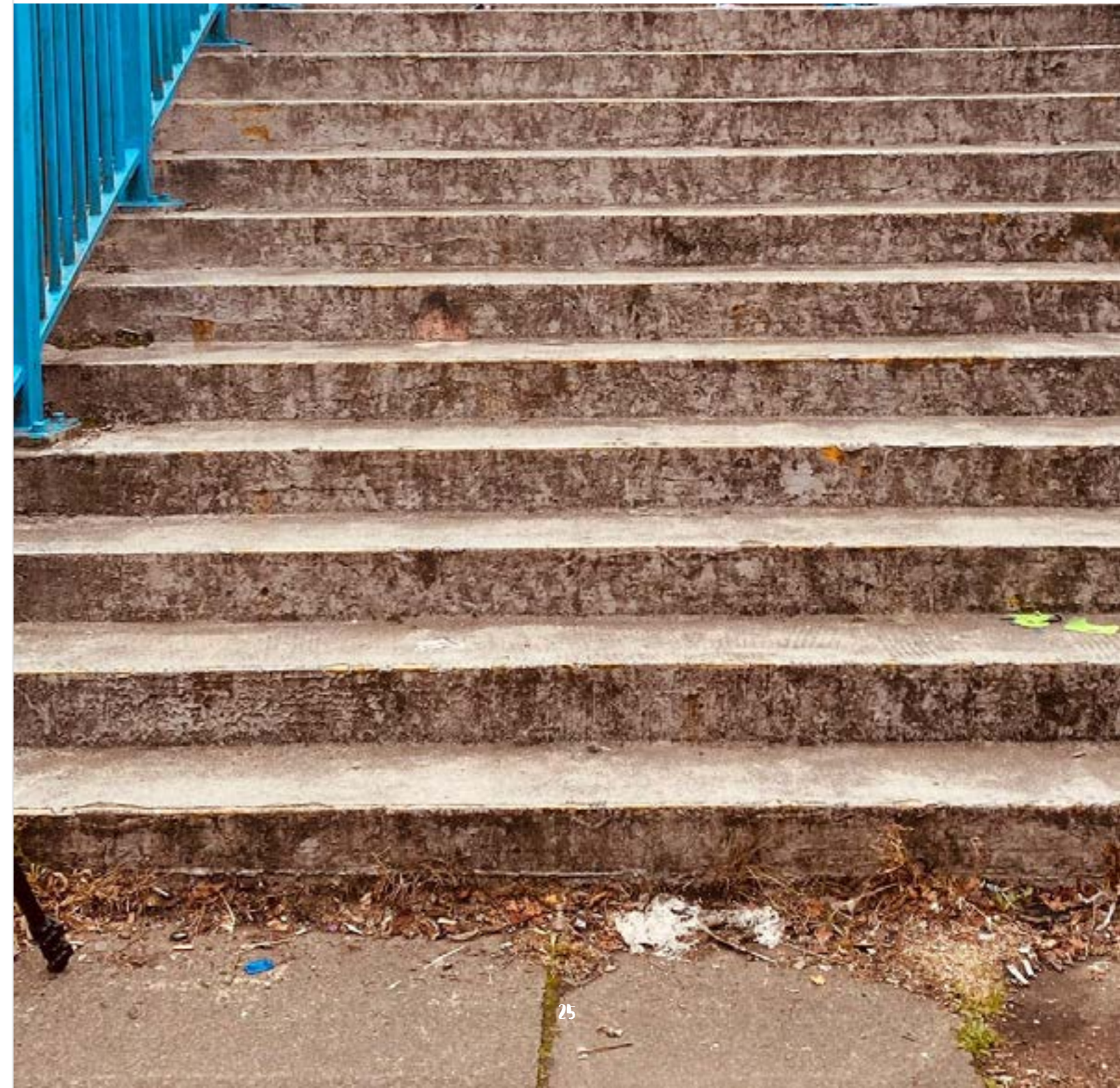
This also highlights another tension,

between what users want from a toolkit and what creators think that users need. Both creators and users pointed to the tensions between complexity and reductive simplicity. Toolkit creators pointed to the danger of breaking down complex activities into discrete constituent parts and packaging them as tools, with the idea that a) people with less investment of skill, time, effort, or energy put into training the person, and b) across quite different contexts from the one in which the toolkit was devised, could then go away and do it. This also comes up against a tension identified by both toolkit creators and users between wanting toolkits to encourage and enable a flexible and reflexive approach and the realities of time and situational constraints. Community organisations and practitioners simply do not regularly have the time and space to engage lengthy reflexive processes.

Conversation participants were united in thinking that a 'one size fits all' toolkit cannot work, although this is implied in many toolkits and, for some toolkits, replication of a precise process is the intention. There was acknowledgement that different things are required in

different contexts, so an overly prescriptive approach can be too simplistic or too rigid. One practitioner noted that a toolkit has to provide a tool, but there also has to be a sense of how that tool can be used in context, and recognition of the limits and specifications of it in this very complex world, with the myriad contexts in which

it might be used. Participants pointed to the tension evident in wanting to take complexity into account, and yet create toolkits that can provide useful, practical guidance. As one HLS user put it, they "sway from thinking a toolkit is useful to thinking it's a bit simplistic and prescriptive."



4 TOOLKIT STORIES

This section contains 'stories' of three different toolkits, told from the perspectives of conversation participants who either created or used the toolkits.

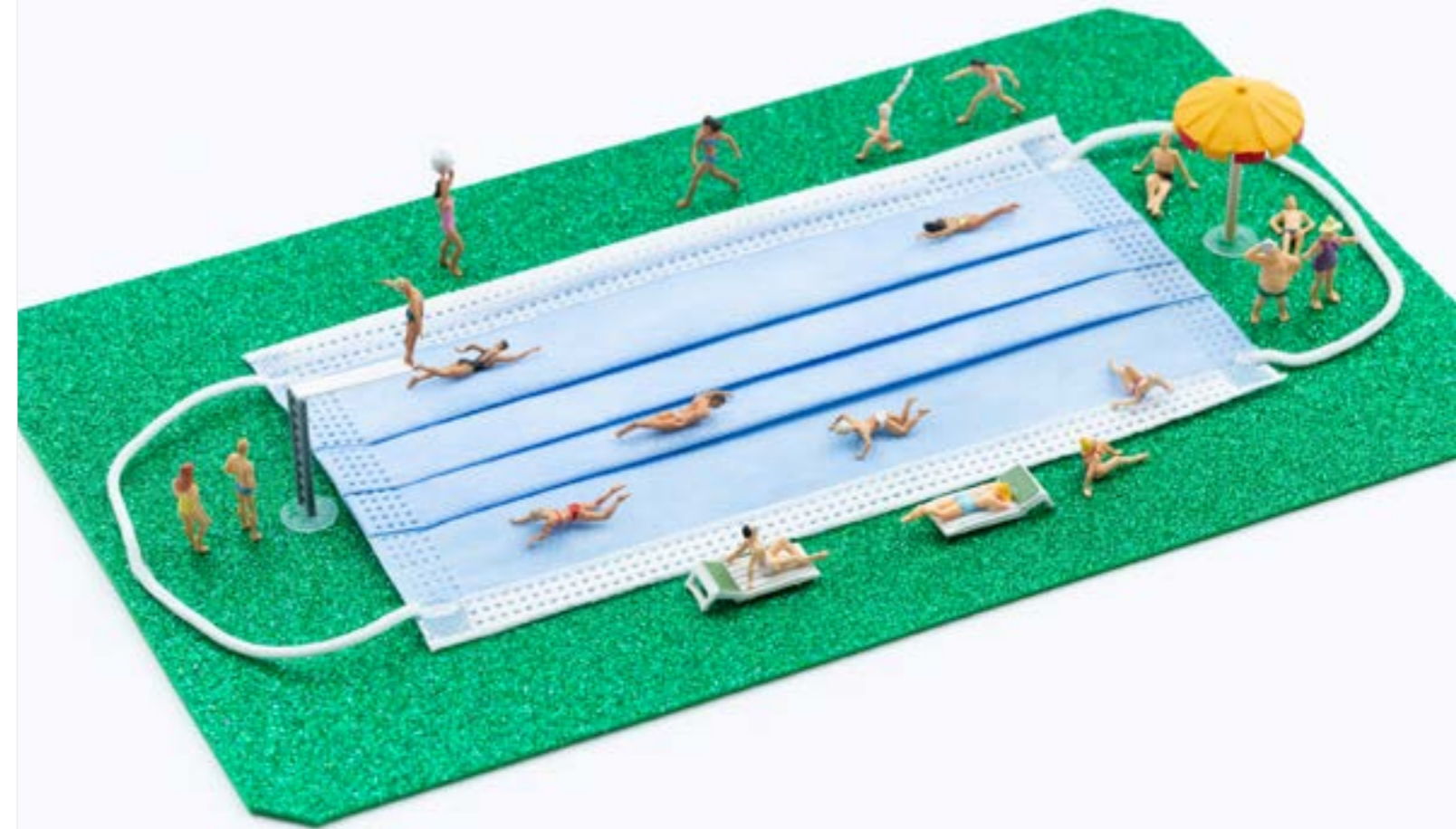
4.1 HUMAN LEARNING SYSTEMS A PRACTICAL GUIDE FOR THE CURIOUS

'Toolkit' story from the perspective of one of the co-authors of the practical guide and creators of the [Human Learning Systems approach](#).

Human Learning Systems (HLS) as a whole is not a toolkit, the creator describes it as an alternative public management paradigm, which, in a sense, is a giant action research process. The HLS practical guide for the curious was created to link this paradigm with practice manifestations, using case study exemplars. Created by colleagues from the Centre for Public Impact, Healthcare Improvement Scotland and two practitioners who had done work to enact the approach, the 'how-to' practical guide for the curious is seen by the author as essentially an experiment into how to enact HLS public services management strategies. The creation of it came about in response to requests from people who were keen for more information on how to do things using the HLS approach, including Healthcare Improvement Scotland who provided the funding to write it.

The author sees the guide as being for people who want to do public management differently, to get them started. With the HLS approach supporting people to move away from a prescriptive programme and encouraging learning and experimentation, the guide is conceptualised as a heuristic device that offers some structure and a sense of process to enact a way of thinking in the world. It is centred on the HLS framework of interconnected learning cycles and breaks down phases of the cycles outlining how to do each bit.

To use the guide effectively the author states that the person who will potentially



use it needs a strong enough sense of dissonance with how things are working right now. That dissonance is the energy for change, and starts the paradigm shift. The author sees that users of the guide also need enough agency to create a permission space to do things differently, whether that comes from within the context of their own professional autonomy or from leadership allowing the space to do it differently. Users also need 'collective bravery' with allies who are feeling the dissonance too, because paradigm shifts happen with momentum.

From the author's perspective, the guide itself represents something of a paradox. It is an idealised representation of a bunch of "really messy work" that people have done and quite literally the attempt to turn messy, complex, relational work into some kind of process that people can follow. Creating the guide was challenging, in trying to capture a process, to articulate all the things that need to happen to make the process work. The creators took an iterative approach trying to understand how people are using the resource, following up with everybody who has downloaded it at several intervals.

The author sees the use of two in-depth case studies as core to the guide. These show what happened in the work of the practitioners who have used the HLS approach and provide some knowledge and insight into the process of enacting the learning cycle. Future iterations may include more case studies and bring in different voices that make it more user-centred, as well as finding a way of talking more about the relational context and conditions in which people are able to do this radically different kind of work.

Toolkit story from the perspective of someone who has used the HLS: A practical guide for the curious

The guide author noted that people have said they like the guide – saying it creates connection and is valuable as a reference guide for people who are trying to think about that process.

One conversation participant who has used the HLS guide in developing education programmes spoke of a strong sense of resonance on first reading it. In particular, the idea that outcomes in people’s lives are not ‘delivered’ by the public sector (rather outcomes are created by the hundreds of different factors in the unique complex system that is each person’s life), resonated with their own personal beliefs and experiences.

The guide was discovered almost by chance, having been shared with the participant by a colleague in another organisation, indicating the importance of sharing via social networks. Reading it they found it very relevant to their own work. The ideas around needing to learn from everyone involved, having everyone feeding into the learning, seemed especially useful for thinking about an educational programme that was being developed.

The key usefulness of the guide has been informing the participant’s own thinking and providing reassurance about taking an exploratory and learning approach. Rather than setting forth to “train” people, this learning approach gives a sense of everyone being experts in their own areas. The participant appreciated the weight of theory and academic rigour underpinning the approach, and spoke of “feeling like feet are on solid ground”. The HLS approach enriched the context, creating an environment for learning, with other relevant research also taken into consideration. The participant’s practice of asking people ‘what they notice’ when first working with them is a manifestation of the fit between their own personal learning and how this has developed in tandem with engaging the HLS approach.

The participant described using the guide somewhat “covertly” to inform programmes, rather than explicitly referring to HLS in conversation with others. User agency, described above as necessary, is evident in the participant deciding that approaching the programme development as a learning process is useful, and doing so regardless of whether this is fully embraced organisationally.

Although not used explicitly nor followed completely, the HLS guide has helped the participant to articulate to others what they are doing and what they need for the programme development, in particular, acknowledgement of creating the space in the environment for the learning to take place. “The value of it is just the absolute upfront approach of saying that change and outcomes aren’t imposed on people - that you need to create an environment for people to interact and learn together.” This alludes to different forms of ‘use’, wider and narrower and more or less directly applied, here in embodying those ways of seeing learning which then percolate the development process as a whole.

4.2 DOVE BODY IMAGE TOOLKIT

This story of the [Dove body image toolkit](#) was told by two practitioners who have recently used the toolkit.

This resource was described by community-based youth workers participating in a conversation as having really good, accessible, practical exercises and facts relevant to body image. The participants work in a youth-led organisation and body image had been chosen by young people as a social issue to work on. Once body image was identified as the topic of interest, youth workers searched for relevant information and found the Dove resource through word of mouth, recommended by a colleague who had used it on a project with another group and found it useful.

The toolkit provided means for young people to explore body image, in a way that was safe and not heavy-handed. The activities moved the issue away from subjective experience and the young people felt empowered and were able to speak about it. Importantly for the youth workers, the toolkit was from a robust and reputable source, so they felt confident that they could trust the factual material, it would not be “fake news”.

The toolkit contained activities, some of which were used in the existing format, and some of which were adapted by the youth workers. For example, there were a lot of “quick facts” that the youth workers made into a quiz for the young people. The youth workers pointed out that there may have been challenges if the toolkit had been used exactly the way it is set out, but they could not imagine anyone doing that. Generally, toolkits are used as inspiration and ideas, as a starting point, rather than a prescriptive way to do things. They described using a “pick and mix” approach and, in a sense, creating their own ‘toolbox’ from the multiple toolkits that are available. This is the first time they had used this particular Dove toolkit, but they were accustomed to using a single toolkit in a few different contexts. The young people, too, pick and mix the tools they want to use.

The value in the Dove toolkit for the youth workers lay in two key areas. First, they felt assured of the robustness and quality of it, that it is going to be a good, valuable experience for these young people and fits with their commitment to deliver high quality youth work practice. With sensitive topics like body image, selecting quality resources to use is essential. Second, as an organisation with limited capacity, time and funds, drawing on a toolkit that has been developed by a reputable organisation with vast resources saves time and prevents doubling up on work that has already been done by people who know the topic better. Implicit in the youth workers’ account were the skills, expertise and knowledge of the young people, as well as their confidence in adapting the resources, which they contribute to the process of bringing the toolkit to life.

4.3 THE CROSS-POLLINATION RESOURCE PACK

FACILITATING CROSS-SECTOR DESIGN COLLABORATION

The story of the [Cross-pollination Resource Pack](#) is told from the perspective of one of the creators.

The Cross-pollination Resource Pack (CRP) might be a toolkit, but it is not called a toolkit. Created with the built environment sector in mind, the creators felt that 'toolkit' language is often overused and what are called 'toolkits' are not always helpful. Their intention was that the CRP be useful and used.

The resource described cross-pollination as "a creative approach used to bring representatives from different groups, organisations and sectors together to identify common and complementary interests, share information on live projects, and work together to unearth and connect their collective skills and resources to enhance existing projects and initiatives or to codesign new ones." (CRP, 2023, p.3)

Centred on the 'cross-pollination' approach, the creators developed the CRP to provide training, guiding people through the steps of how to use the approach to suit their needs, so they can then use this with the wider group. The creator participating in our conversation said, "it's a scaffolding explanation of an approach that we think is really valuable – we call it cross-pollination – to build community networks that are going to be sustainable."

The CRP was designed to be very practical and adaptable, with accessibility of key importance. It includes printable resources; a set of three cards (the 'tools') that communities (users) print out to use with groups. The creators saw having tools (or artifacts) as useful, as a means of easing the process of conversation in participatory action research. The CRP was developed to provide a context for this, including information on the origin, value and application of the approach. It also includes grounding exercises to get people warmed up to talking about what are quite personal things – the projects they want to do.

To effectively use the CRP, communities need two key things. One, the practical kit – card, coloured paper, sharpie pens, string tags and so on. This in itself involves some cost and not all communities have the funds or resources for that. Recognising this, the research team put together packs of resources to support communities in implementing the approach. Two, to be effective the community using it needs to have agency beforehand. They need to be enthused and want to apply it.

The CRP resource was developed from a knowledge exchange project, which involved a partnership between researchers at The Open University and The Glass-House Community Led Design, working with a range of local partners in Scotland, England and Wales. The whole research team was involved in the creation of the CRP, using Miro (online platform) in a collaborative, creative process. They see the current iteration as a first draft, hoping that critical feedback from communities and further research will enable them to adapt it as it continues to evolve. How people find the CRP is a consideration. Anchoring it within an organisation or some larger ongoing project is something that would be important for the resource pack to have longevity and resilience.

The creators see the value of the CRP lying in the assets-based approach which helps communities to think differently. The approach uses the cards to work with groups, building on what they already have. Further they developed the CRP to have a cascading approach in which, having learned how to do it, people are able to use it to 'cascade the ideas' across networks, and inspire other groups or for different objectives. The creators felt that communities can be fatigued and bogged down, having had experiences of co-production being 'done to' them. An assets-based option, which focuses primarily on existing strengths, as something they want to do, was seen as something that has true value. Interestingly the articulated value here stems from the overall worldview of which the toolkit is a manifestation.



5 CONCLUDING COMMENTS

The Organisation for Economic Co-operation and Development (OECD) suggests that the ideal toolkit should be “adaptable and transferable; approachable and user-centred; action oriented; and modular” (Hanson, 2018a). Further, to be used and useful, toolkits need to be linked with the purpose to which they will be applied (Hanson, 2021), aligned with the users’ needs or problems, and their skills, capacity and experience, as well as close enough to what the organisation is ready for (2018b). From our engagement with toolkits and conversations with creators and users of these, consideration of the wider process and context in which toolkits sit is critical for understanding, selecting and effectively using the right toolkit or tools for the job. The themes that emerged during this scoping project point to the interplay of several key elements, namely the purpose, the context, the skillful user and the toolkit itself (see Figure 1). It seems that all of these elements are necessary for a toolkit to be usefully applied in ways that are faithful to the intention of the toolkit and that do not oversimplify.

At each point of the triangle (toolkit, user, context) there are things that will influence how the toolkit is enacted in order to achieve the purpose. It seems key to think about that bigger picture, rather than focussing in on the toolkit as a specific, narrowly defined output. This interplay of elements, influenced by the variable, dynamic factors at play, is evident in the toolkit stories. The youth workers could identify quality resources (toolkits) that were suitable and relevant for their context, to help them respond to young people’s needs on a range of issues. Their overall youth work approach dictates their purpose and they were engaged with young people who could identify the issues. The youth workers value practicality

and having resources that can easily be picked up as they are time poor, but also like to pick and choose based on their own knowledge and skills, and the needs of the group.

In the story of the HLS practical guide for the curious, there was a match between individual purpose of the user and the toolkit as a resource, but a lack of permission space which constrained the use of it within their particular context. The skillful use was somewhat ‘softer’ and more diffuse, yet it was significant in informing, reassuring and shaping their overall approach, rather than being explicitly articulated and implemented.



Figure 1: Model of interactive elements in effective use of toolkits

Reflecting on the themes that emerged, there are some interesting threads running through the conversations and toolkit stories, which provide insights into how toolkits are used and also perhaps expose or challenge some underlying assumptions. The concept of user agency emerged as an important factor and one that was not explicitly apparent in reviewing the toolkits. In articulating this, it highlights the importance of environmental, relational and personal factors in play, and suggests the need for assessing, rather than assuming, readiness to use particular toolkits.

Other threads running through the user toolkit stories also provide insights of potential interest for toolkit creators. The stories highlighted that, despite dramatically different contexts, users in

both stories were highly attracted to the robustness and quality of the resources they were using. The source of the toolkit and the rigour underlying it were considered. Both user toolkit stories also identified social networks as important in finding the toolkit. Tapping into these to disseminate and possibly to house their work, could be useful for toolkit creators, who expressed concerns in our conversations about ensuring accessibility and longevity of toolkits.

Throughout our exploration of toolkits, tensions were evident related to the need for toolkits to provide practical, accessible tools with sufficient direction to be used across a range of contexts by different people, but with the need also for enough flexibility and openness to take the complexity of contexts into account and

allow people to plot their own learning and experimentation. Again, the users' toolkit stories are useful in highlighting this tension. The busy youth workers, navigating many topics with young people, want resources, lesson plans and activities ready to use for their identified purpose. The person developing education programmes, on the other hand, was not engaging so practically with tools, but finding the resource useful for another higher level and holistic form of use. These examples illustrate both the tensions and the different levels toolkits can focus upon.

The conversations with toolkit creators and users clarify that toolkits need to have some tools or, at least, a practical edge - something that has linkages between the approach or purpose and the practice. We discovered that some self-described 'toolkits' do not provide this and it is difficult to see how they assist users in addressing the intended purpose. Conversely, some toolkits that consist largely of action-oriented materials do not convey the paradigm within which the tools sit or the larger approach, increasing the risk of people using the materials in ways that may not be coherent or effective. Further, authors of some resources, which do provide a clear methodological approach and practical application of this, choose not to call the resource a toolkit because of perceived connotations and limitations of the term.

The conversations also pointed toward some ways to respond to the challenges that are evident in toolkit design and use. The discussions suggest that between the overly simplistic, reductive kind of toolkit approach and the more flexible, open-ended approach, there is room for bridging devices that span the gap and hold the process gently. Provocations or looser reflexive tools could potentially

help straddle thought and action. Housing resources in locations and ways in which these can be sustained and updated, with dynamic and interactive components, could also help the responsive and ongoing evolution of toolkits. It may be that housing these within larger meta-resources or libraries could help provide a range of options for users to consider in relation to their purpose and context (see, for example, the [OECD Toolkit Navigator](#)). Although without careful curation and good internal navigation, these could prove overwhelming and risk access.

In keeping with these ideas, we draw on the themes that emerged from our scoping work to pose the following reflexive questions for users and creators to consider in assessing the value of toolkits.

QUESTIONS FOR TOOLKIT AUTHORS

1
What is the purpose of this toolkit? What value does it have for users in addressing that purpose?

2
Are the guiding theory and underpinning principles of the toolkit explicitly articulated? Are any implications of these for the user explicitly articulated?

3
Who is the intended audience for this toolkit? Did members of that audience contribute meaningfully to the design?

4
How adaptable is this toolkit? Does it provide any guidance for adaptation (or not) to balance integrity with contextualisation?

5
What does the 'user' / a community need to be able to use the toolkit effectively? What skills, resources, additional information, implementation and/or environmental support, and is this realistic?

6
Does the toolkit provide case studies or examples of implementation and how rich are these? Do these include difficulties as well as successes?

7
How easily can users find their way around the toolkit? Does the toolkit signpost users to additional relevant information/resources that may support the user's use of the toolkit?

8
Does the toolkit provide sufficient space for learning and experimentation, and enough structure to support thinking, bearing in mind your target settings?

QUESTIONS FOR TOOLKIT USERS

1

What is your purpose in considering this toolkit? How is the toolkit of value in addressing the purpose?

2

What is the theory or idea behind this toolkit? Do these resonate with your intention and purpose? Do they reflect or challenge dominant views in your workplace?

3

Who is the intended audience for this toolkit? Did members of that audience contribute to the design?

4

Will this work for you in your setting? How amenable is this resource to being adapted to your setting(s) and do you have the resources to adapt it as needed?

5

Does the toolkit help you to assess readiness or what you will need to be successful? Does it let you know what you need (skills, resources, additional info, implementation support) to be able to use this effectively?

6

Does this toolkit provide useful examples of implementation and learning from other users?

7

How accessible and navigable is the toolkit? Does the toolkit provide signposting to additional resources that might be useful?

8

Does the toolkit provide sufficient space for learning and experimentation, and enough structure to add value to your thinking?

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LEARN CRITICALLY... EXPERIMENT... CONTINUOUSLY REFLECT.

LOOK TO THE FUTURE... THINK DIFFERENTLY...



WHY IS A TOOLKIT BEING DEVELOPED? TO SHARE LEARNING AND EXPERIENCE



ETHICS AND VALUES



NEED ROBUST RESOURCES



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Universities are REPUTABLE, but are ACADEMIC TOOLKITS always ACCESSIBLE?



CONTEXT





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