PR3A2: Piloting Methodology

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Consortium

The consortium governing the project is adequately representing a wide range of expertise, as 4 Higher Education Institutions and 1 university library (NTNU, Scuola Superiore Sant'Anna, Sofia University ST Kliment Ohridski, University of Tartu) join hands with a web education specialist (Web2Learn) and an NGO of 16 cultural associations: OSYGY. This mix of knowledge, skills, experiences and networks guarantees a layered approach toward a diverse range of stakeholders.

	Name	Short Name	Country
1	**Norwegian University of Sciences and Technology**	NTNU	Norway
2	**Scuola Superiore di Studi Universitari e di Perfezionamento Sant'Anna, Pisa**	SA	Italy
3	**Web2Learn**	W2L	Greece
4	**Sofia University St Kliment Ohridski**	SU	Bulgaria
5	**University of Tartu**	UT	Estonia
6	**Federation of Women Association "Kores of Cyclades"**	OSYGY	Greece

Revision History

Version	Date	Revised by	Reason
V0.1	25/02/2023	Alexandra Angeletaki	Creation of first version of document
V0.2	28/02/2023	Paula Rice	Editing and proofreading
V0.3	21/03/2023	Stig Tobiassen	Visual editing
V0.4	21/03/2023	Anna Mavroudi	Editing
V0.5	27/03/2023	Chiara Evangelista	Cross-checking
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V0.7	30/03/2023	Ave Matsin	Cross-checking
V0.8	31/03/2023	Christina Kanellou	Transferring the document into the eCHOing template, visual editing & cross-checking

Statement of originality:

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

Disclaimer:

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List of Abbreviations

The following table presents the acronyms used in the deliverable in alphabetical order.

Abbreviations	Description
OII	**Open Innovation Initiative**
CHO(s)	**Cultural Heritage Organisation(s)**
HEI(s)	**Higher Education Institution(s)**
AP(s)	**Associated Partner(s)**
PR	**Project Result**

Executive Summary

The eCHOing project focuses on the recovery of the cultural sector, specifically small and medium-sized cultural heritage organisations (CHOs), through Open Innovation collaborations between academia, the cultural heritage sector, and members of the public. The project conducted a desktop survey of the best international and European practices of such collaborations and established a five-point framework related to a practice-oriented approach to guide open innovation collaboration initiatives between HEIs and CHOs.

1. Instructions to CHOs

1.1. Why we're sharing this document

The goal of PR3A2: Piloting methodology is to allow you to comment on the implementation actions, proposed here and see whether that is suitable for your Cultural Organisation (CHO) before scaling up in the following project period of eCHOing (PR4 phase). We would also like you to rate the developed criteria and work modalities proposed and adjust them to your organisational needs and timeline.

We need your comments by the end of April 2023: any comment will do, we need to know whether the proposed steps of working methodology for piloting OI projects in collaboration with you in September is clear and suitable for your organisation.

1.2. What PR3 Stands For

The Use of PR3 which means Project Result 3, is the third phase of eCHOIng project led by NTNU and the aim is to establish a collaboration methodology that will allow the invited Cultural organisations to comment and work closely with eCHOing partners in developing a fruitful dialogue and a Methodology that can be then replicated by such collaborations between CHOs and HEIs. The outcome will be 24 contracts of project implementation in autumn 2023 called PR4.

1.3. Proposed Steps

STEP 1 – February 2023: Each eCHOing invited partner has answered the following mapping questions and is willing to pilot the methodology produced by eCHOing. This methodology serves as a road map to open innovation driven by HEIs for the benefit of CHOs. The aim is to establish new and innovative ways of collaboration between HEIs and CHOs. Once

we agree on the proposed methodology, each CHO will host a student who will work on a specific OII solution. Echoing partners have selected one CHO to pilot the OI methodology adapted to its needs and challenges.

AIM: To establish a dialogue between the HEIs and CHOs.

Mapping the needs : Already completed January to February 2023

1. Questions on their organisation

Question	Name of AP
A short description of your organisation, staff numbers and main goals.	
What are your main end-users? Audience type of public, who do you appeal to with your work?	
If you were to collaborate with a small group of students from eCHOing which type of Open Innovation would you be interested in?	
Any particular ideas and needs we need to consider for such a collaboration?	
Name and email of the person we can contact for such a collaboration!	
Comments	

Table 1

STEP 2 – March to April 2023: The PR3A2 piloting methodology delivered to 5 selected APs for comments.

AIM: To collect feedback from CHOs and revise the document before delivering to all APs

Echoing Partners, make sure the following is communicated to the APs:

➔ Knowledge of the priorities established by eCHOing programme, the characteristics of the call.
➔ Echoing project objectives and timeline
➔ What APs are expected to deliver: host a student

So that the CHOs can deliver:

➔ A clear vision of one's organisational aims and needs, and of the objectives the organisation wants to pursue through its prospective collaboration with Echoing.
➔ Establish an understanding of OI topics or themes that might interest the APs partners (help tool–Interview guide)

Please put here the email of the person to whom you will be sending the final document. This should be the representative of the selected CHO with whom you have established a dialogue, as you have indicated here:

Echoing partner	CHO name	Name and email of the contact person
NTNU	Levanger Museum	Name: Maru Calmaestra Role: Coordinator of outreach activities

Santa Anna	Museo Leonardiano di Vinci	Name: Roberta Barsanti Role: Director
Tartu University	Estonian National Museum, Heimtali Museum	Name: Tuuli Tubin McGinley Role: Exhibition and program manager
Sofia University	Troyan: Crafts and arts Museums	Name: Eleonora Avdzhieva Role: Director

Table 2

Step 3 – September to October 2023: Each Echoing partner needs to make sure that the CHOs will be able establish a project pilot and to host one or two students for one to two weeks in September–October 2023. Establish an internal communication channel.

AIM: The CHOs must deliver to Echoing team the following:

- Organisers of hosting period:

  1. Names and members of CHOs.
  2. Type of <u>OII</u> that is of interest to them.
  3. Purpose and background of such a project from their point of view.
  4. Needs and priorities: Tools, skills, infrastructure required.
  5. What resources they have available, e.g., people, time, budget, educational outreach, internships etc.
  6. What skills or resources they need from the HEIs for such a collaboration.

7. Period the project can be implemented and the number of students needed.
8. Establishing communication channels for exchange of information between the Echoing team students involved and the CHO contact person.

- Operational logistics to be established by the Echoing partner in collaboration with the selected CHO for the hosting period:
    1. Group members
    2. Collaboration work plan and timeline of PR3 presented by the Echoing partners.

1.4. To Be Commented by Selected CHOs

★ <u>Roles of Organisers</u>: Who will be organising the OI event?
★ <u>Quality Assessment</u>: What is the expected goal of the project?
★ <u>Framework and Tools</u>: Which challenges will they be addressing?
★ <u>Practicalities</u>: What resources, tools do you need for organising an OI event?

Pilot Methodology–Action plan, from project idea to project implementation: In order to establish an understanding of the needs and priorities of the organisations the selected CHOs represent, and also who are to pilot the action plans suggested by Echoing, we need to have your opinion on the following timeline and piloting steps:

The 5–stage organisation of an OI project

The 5–stage structure consists of the following phases and it aims to provide a proposed action plan for the initiation, and implementation of a project collaboration framework (see Draft Methodology pg. 13).

Image 1

1. INITIATE – A strategic alliance between a university and a cultural organisation to explore the open innovative design models suited to the needs of the partners and to promoting their goals.

2. DEVELOP – Establishing project working groups composed of staff and students from the HEI and CHO staff to develop working plans and choose the OI initiatives they want to work on.

3. PREPARE – Agree on an implementation plan and a timeline, the dates, the target groups of the proposed project and the methods of engagement for the target groups.

4. IMPLEMENT – Implement the project, with the cultural organisation leading the project work, which is adjusted to their needs and challenges. The collaborating HEI explores and plans solutions as well as providing support through skill-mentoring of the participants to ensure quality of experience (digital or analogue).

5. EVALUATE – Review the entire project and complete a report that covers every aspect of project production, evaluating its outcome through partners and user experience surveys and interviews. This last stage will provide the participants with valuable feedback.
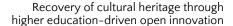
2.   The 5–Phase Implementation

ACTIONS	WORKING MODALITIES FOR CHOs TO COMMENT ON	WORKING MODALITIES FOR ECHOING PARTNERS TO COMMENT ON
In regards to the table, CHOs need to discuss and let us know: 1. Whether the following are important for their institutions 2. Are there parts that are difficult to understand? 3. Are there any missing elements?	Proposed action: CHOs can add here any actions they believe could help their organisation achieve the proposed aim.	Proposed actions by eCHOing: The proposed Echoing piloting methodology scenario will be adjusted to the specific environment and needs of each CHO that implements and evaluates a selected OI project. This is **a proposed road map** for the CHOs that will be invited to host a student in September and implement an OI event or project in autumn 2023.

1) INITIATE: February to March 2023		
ACTIONS	**WORKING MODALITIES FOR CHOs TO COMMENT ON**	**WORKING MODALITIES FOR ECHOING PARTNERS TO COMMENT ON**
Establish a working group between the university and the cultural organisation to explore the open innovative design models suited to the needs of the partners and to their goals.	CHOs express their interest in the type of OII that is of interest to them & adjusted to their: • needs and priorities (tools, skills and infrastructure required) • resources available (people, time, budget, educational outreach, legal issues).	• Establish an understanding of Open Innovation initiatives for CHos. • Use our MMG guide & eCHOIng online modules • Set up a meeting discussing a possible scenario of an OI event or project that would serve their needs. • Decide the period for hosting the students.

eCHOIng Word Template V1_3.docx

2) **DEVELOP**: May to September 2023		
ACTIONS	**WORKING MODALITIES FOR CHOs TO COMMENT ON**	**WORKING MODALITIES FOR ECHOING PARTNERS TO COMMENT ON**
Establish PR3 piloting methodology suitable to a particular OIP pilot event and date: ● Choose the types of OII of interest in relation to the aims of the CHO and resources needed. ● Define the hosting period. Develop a strategic plan and a work plan:	Establish realistic collaborative working practices between HEI staff and students and the CHO representatives. **Benefits for the CHO:** Identify the proposed benefits for CHOs and the engagement they wish for the target public. Try to anticipate possible risks and failures in the proposed implementation. Goal achievement should also be seen in terms of time and resources. CHOs and HEIs should be in agreement regarding how the work is to be done and who is to do it. A	CHOs are selected by eCHOing partners and informed on the practicalities and the results expected. Draft methodology shared for all. Plan a meeting to discuss the details clear up irrelevancies answer questions Before hosting a student: Establish a goal achievement document to be shared with the CHOs. Outcome: eCHOing partners sign an internal work plan with the CHOs willing to pilot the selected project.

Outline the objectives in detail, create a project timeline, develop a plan to coordinate partners, and include plans for resources. 1. What is the aim of the event? 2. What is the aim of the event? 3. What results are to be achieved? 4. How the work is to be carried out. 5. Who is the target audience? 6. What are the success criteria for such an event (see our checklist further down) 7. Needs and priorities: Tools, skills and infrastructure required. 8. Resources available, e.g., people, time, budget,	work plan should demonstrate how the success criteria will be realised and how the work cumulates in reaching the goal.	Benefits for the CHO: Identify the proposed benefits for CHOs and the engagement they wish for the target public. Try to anticipate possible risks and failures of the proposed implementation. eCHOing invites to a webinar in June to Kickstart the procedure.

3) **PREPARE**: May 2023		
	educational outreach, legal issues.		
ACTIONS	**WORKING MODALITIES FOR CHOs TO COMMENT ON**	**WORKING MODALITIES FOR ECHOING PARTNERS TO COMMENT ON**
Prepare an OI pilot event tailored to 5 CHO, focus on the expected outcome in relation to the target audience & prepare the implementation of the OII projects. **Implementation plan:** Plan the event in detail. • Agree on the date and type of event. • Agree on the roles of the organisers. Who is doing what?	Agree on an implementation plan and a timeline, the dates, the target groups of the proposed project and on methods of engagement for the target groups. Express an interest in mentoring activities and skills, tools and resources.	**For Students and HEis** 1. Agree on the date for the pilot project 2. Target groups of the proposed project. Establish communication channels and marketing strategies to interact effectively with target audiences. 3. Plan skill mentoring activities. 4. Design a plan on how to promote the project results.

• Plan communication channels with the selected audience. • Plan any skill mentoring activities needed during the event.		
4) IMPLEMENT: September to October 2023		
ACTIONS	**WORKING MODALITIES FOR CHOs TO COMMENT ON**	**WORKING MODALITIES FOR ECHOING PARTNERS TO COMMENT ON**
Run the pilot project: The collaborating HEI students run the pilot together with the CHOs on the date agreed and for the target audience. Break down the project into manageable checklists with a timeline; identify any risks and challenges.	1. Connect the defined goal to the CHO and community needs – ensure that what you want to achieve does address a challenge or problem that is important to your CHO and the local community that it serves. The benefit criteria checklist summarised are clearly outlined and measurable and are	• **Students** need to establish monitoring plans to facilitate that the planned objectives are achieved in a timely and efficient manner and that project outcomes are implemented in a way that yields tangible results. • Break down the project into manageable checklists with a timeline; identify any risks and challenges.

Identify benefits for CHOs. **Monitor the feedback from the target audience:** Define how feedback will be collected from the stakeholders/the public/the possible participants for the OI project and outcomes to relevant audiences.	released during and after the project to all working groups.	• Assist the CHOs in the implementation of the events. • Define criteria to measure impact and evaluate results and measure the achievements of the collaboration. The benefit criteria checklist. The benefits should be summarised and clearly outlined. These should be measurable and are released during and after the project to all working groups.
5) EVALUATE: October to December 2023		
ACTIONS	**WORKING MODALITIES FOR CHOs TO COMMENT ON**	**WORKING MODALITIES FOR ECHOING PARTNERS TO COMMENT ON**
Collect feedback from all the groups involved, create a sustainability program to support and grow the results of the initiative. Date decided by the working group.	Create evaluation suites and súrveys, or interviews to measure the actual project outcomes from the organisation's perspective or stakeholders' perspective.	Review the entire project and complete a report that covers every aspect of project production, evaluating its outcome through user experience surveys and interviews.

SEE SURVEY TOOLKIT	Discuss the possibility of long term collaboration and implementation of such OI projects.	Assessment of gain: ● Risks that are identified and assessed prior to the start of the project. ● Performance is reviewed after completion of the project to assess success or failure.

Table 3

3. Checklist On The Benefit Criteria For Collaborations Between HEIs and CHOs

The benefits of an OI collaboration between HEIs and CHos, should be summarised and clearly outlined. These should be measurable and will be released during the next months as part of the action plans for the implementation of OII adapted to selected CHOs.

Please rate the following criteria and benefits from 1 to 6, 1 being the least important and 6 the most important criteria for the implementation of your collaborative project:

CRITERIA	IMPACT/BENEFITS	RATE FROM 1–6
1. Involving citizens	Increase the number of citizens who participate, contribute or become involved in the event/project or express their wish to join the CHOs or want to stay in touch in future activities.	Example: 3
2. Allowing Capacity building for organisations (HEIs & CHOs)	1. Increase in their capacity and level of expertise in general project development and management, resource development, stakeholder engagement and quality assurance processes. 2. Strengthening their position in their national and local area of influence as the experts in the topic of Cultural Heritage for post–pandemic recovery. 3. Gain new knowledge of OI methods that can be applied after the end of the project to enrich conventional teaching, specific to culture management and dissemination strategy implementation.	Please rank them accordingly Example 1: rated as 6 2 rated as 4 3, rated as 1

	4. Gain theoretical know-how and practical experience, and hands-on consolidation that will help them to use open innovation methods in their future professional activities. 5. Development of professional skills and personal attributes such as communication, problem solving, collaboration, leadership and confidence. 6. Increase the sustainability parameters	
3. Recognising disadvantaged areas (socio-economic dimension)	Have limited economic resources, marketing or digital skills and possibilities to accept donations. Relate to specialised stakeholders through concrete actions and channels.	
4. Target specific population groups (rural vs urban, gender-wise, disabled, etc.)	Empowerment of rurality versus centrality/urbanity, inclusion of diverse communities and identities.	
Addressing urgent, real-life challenges	1. Creating impact for the local communities. 2. Becoming more resilient, up-to-date, more relevant to society's needs (both HEIS and CHOs).	
Establish local and International visibility	Greater audience engagement.	

Deliver digital skills needed	Contribute to the revival of cultural heritage through digital transformation. Obtain the digital skills needed for a sustainable monitoring of projects and events.	
Adjust the level & multiplicity of funding sources etc.)	Clear financing mechanisms. Explore new funding opportunities. Increase the ability to attract new funding sources.	
Facilitate transfer of knowledge from HEIs	Enrich conventional teaching, specific to culture management and dissemination strategy implementation for both.	
Create Effective Collaboration procedures	Fostering business-academia-civil society cooperation and extension of their networks across a wider range of stakeholders and countries.	

Table 4