Design Framework for The Implementation of OIPs

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Abstract:	Provide a guideline for the development of OIP (Open Innovation Project) driven by Higher Education Institutes (HEIs) for the benefit of Cultural Heritage Organisations (CHOs). The outcome to be expected is the definition of a cooperation framework that could enhance and optimise the collaboration between HEIs and CHOs.
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Consortium

The project is represented by a wide range of expertise, as four Higher Education Institutions and one 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 comprising 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

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Disclaimer:

Table of Contents

List of Figures

Design Framework for The Implementation of OIPs

List of Tables

List of Abbreviations

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

Abbreviations	Description
OI	**Open Innovation**
OIP	**Open Innovation Project**
CHOs	**Cultural Heritage Organisations**
HEIs	**Higher Education Institutions**
HEIs	**Higher Education Institutions**

Executive Summary

The purpose of this draft is to provide a guideline for the development of Open Innovation Project (OIPs) driven by Higher Education Institutes (HEIs) for the benefit of cultural heritage organisations (CHOs). The outcome to be expected is the definition of a cooperation framework that could enhance and optimise the collaboration between HEIs and CHOs.

It addresses all target groups of the echoing project: primarily staff at all levels and students of HEIs as the main beneficiaries. and also stakeholders in the cultural and creative sector and small and medium-sized cultural organisations.

The development basis for this system is derived from the results of PR3 and the practical experience developed by the consortium during the LTTA in which the theoretical tools were tested. The ultimate purpose of this paper and PR4 as a whole derives from these results; it aims to promote them, through their replicability, to greater scaling.

The Design Framework contains useful guidelines to follow when developing OIPs; a working methodology emerged from PR3, effectively tested during LTTA, which includes a series of steps and key points to follow: Scheduling OIPs, Monitoring, Reporting, Quality assurance, Dissemination framework.

After a brief introduction and contextualization of the eCHOing project and its achievements, the theoretical basis developed by eCHOing on which PR4 is rooted will be introduced; finally the practices just mentioned will be explained and defined with the aim of explaining to the target groups which methodologies are useful to follow in order to be successful in developing an OIP.

1. Introduction

The purpose of PR4 is to scale up the working methodology developed and tested during PR3 and the event LTTA for the purpose of finalising 24 OIPs. Specifically, it deals with the collaboration between CHOs and HEIs by managing the development of the projects proposed by the partners through specific tools for monitoring and evaluating.

Expected results:

- OIPs will be designed and implemented based on a clear and concise cooperation framework.
- PR4 will provide a concrete guide with transferable examples, namely the publication "Lessons learned and recommendations to HEIs", which will include all useful procedures and recommendations to successfully replicate the development of an OIP.
- PR4 will also produce a policy brief for HEIs by capitalising on the whole experience of OIPs.
- A series of 10 videos will maximise reach to target groups

PR4 is based on the efforts made by the eCHOing team during PR3, in which effective working methodologies were developed to enable collaboration between CHOs and HEIs. The action plan, which was structured to ensure the success of the collaboration, is explained in the draft methodology, which relies on the tools previously developed by the eCHOing consortium:

- The use of the mapping & matching guide is recommended to explain the concept of open innovation and present examples of projects that have been developed.
- Through the interview guide, the needs of CHOs are brought to light to ensure more efficient collaboration.
- Through the online modules developed by eCHOing, educational tools are made available to develop projects more effectively.

Based on these prerequisites, the actual working methodology for the development of OIP was established: it is structured on five working stages, which are divided into steps (a total of 11 steps for the completion of the procedure):

Image 1

1) **INITIATE** - A strategic alliance between a university and a CHO to explore the OI design models suited to the needs of the partners and to promoting their goals.
   a) Establish a group composed of the collaborating partners and map the competencies they bring to the process allowing interdisciplinary and intercultural approaches.
   b) Set shared objectives: define a clear set of common objectives and establish a mutual understanding of the aims and objectives of the collaboration.
   c) Research: understand previous and existing OI-project collaborations and identify a target type through eCHOing MMG.
2) **DEVELOP** - Establishing project working groups composed of staff and students from the HEI and CHO's staff to develop working plans and choose the OI initiatives they want to work on.
   a) Develop a project plan and timeplan: decide on an approach and create an action plan to implement the OIP, share resources and create content.
   b) Agree on the target groups of the proposed project and on methods of engagement for the target groups.
   c) Establish communication channels and marketing strategies to interact effectively with target audiences.
3) **PREPARE** - 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.
   a) Establish desired outcomes and produce solutions that are implemented in a way that yields tangible results, for the effective replicability of OI driven by HEIs for the benefit of CHOs for whom the solutions are tailored.
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).

  a) Agree on criteria for successful implementation and methods of evaluation.

  b) Monitor progress: monitor the project, establish a timeplan and make adjustments as necessary.

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.

  a) Measure impact: evaluate results through surveys, interviews and participatory webinars or workshops with stakeholders based on the established criteria and determine how to move forward and establish further implementation.

  b) Establish a systematic evaluation suite to assess the success of the collaboration. This could involve setting specific metrics that parties can use in order to measure the achievements of the collaboration.

The testing of the above-mentioned methodology took place during the LTTA, a five-day event organised on the island of Kea by the consortium members. During this event students (HEIs) from the partner countries were organised into working groups and associated with local CHOs for the implementation of a project idea. This experience provided the piloting for the first three working stages of the methodology (initiate, develop, prepare) and from this experience a good strategy for the development of IO projects emerged. The next activities will be focused on scaling up and applying this procedure on the projects defined by the partners (see Chapter 2) in cooperation with the selected CHOs.

2. Partners' projects

Each partner has agreed to commit to monitor, supervise and carry out six OIPs during the PR4 period: in the table below you can find the proposals brought and the indicated timeframe for development.

Overview of 40 OIPs

	Institution	OI Type	Indicative Beneficiary CHO	Indicative Timeframe
1	NTNU	Makathon + Report (e.g. content creation, structural change)	NTNU Library (NTNU Associated Partner [AP] 1)	October
2	NTNU	Makathon + Report	Gunnerus Library (NTNU AP 2)	October
3	NTNU	Makathon + Report	World United Cultures (NTNU AP3)	October
4	NTNU	Wool-a-thon + Report	NTNU AP 4	October
5	NTNU	Innovation Lab + Report	Falstad Center (NTNU AP 5)	October
6	NTNU	Hybrid Exhibition +report	Levanger PhotoMuseum (NTNU AP 6)	October
1	UT	Heritage Flower Bed/ Exhibition (cultural gardening/ heritage gardening)	Estonian National Museum, Heimtali	May 2023

2	UT	Mental Disabilities: Renovating the house where craft spaces are available for people with mental disabilities	Small NGO	end of summer
3	UT	Men's Workshop (men crafting, virtual exhibition)	Estonian National Museum (small dpt)	
4	UT	Sock-a-thon (open workshop on how to mend socks together)	Estonian National museum, Heimtali Museum	Autumn
5	UT	Podcast (a media campaign, interviews about craft people)	Estonian Craft Union	
6	UT	*pending*	*pending*	*pending*
1	SSA	Virtual exhibition	CHO partners	May/ June 2023
2	SSA	Exhibition - Improvement of tech project inside the museum	Vinci Museum	Sept/ Oct

3	SSA	Workshop with HE students	Vinci Museum	Sept/ Oct
4	SSA	*SSA - OSYGY (Kea project? Red color)*	Kea	October
5	SSA	*SSA - OSYGY (Paros project? White color)*	Paros	October
6	SSA	*SSA - OSYGY (Antiparos project? Black color)*	Antiparos	October
1	SU	Citizen-Driven Digitization (an online event with citizens discussing user priorities in digitised)	Plovdiv Library	June
2	SU	Researchers committed to digitization of Serbian resources	National Library of Serbia	Autumn
3	SU	Open Innovation for social change	Unesco Center	Autumn

4	SU	Potential contribution to OSYGY beneficiary - Milos island (cf. Orange project, LTTA)	Women association of Milos	Autumn
5	SU	Potential contribution to OSYGY beneficiary - Kythnos island (cf. blue project, LTTA)	Women association of Kythnos	Autumn
6	SU	Potential contribution to OSYGY beneficiary - Andros island (cf. green project, LTTA)	Women association of Andros	Autumn
1	W2L	Introduction to crowdfunding; for cultural heritage: possibilities, aims and examples. Recording https://lnkd.in/dv-RHvMn and slides https://lnkd.in/drPpimhK	Any CHO	May [Completed]
2	W2L	Crowdfunding made simple: a webinar in English invited speaker: Jill Cousins. Moderator: Katerina Zourou	Any CHO	May [Completed]

		Recording : [Crowdfunding in practice: insights from an Irish museum](#)		
3	W2L	Crowdfunding made simple: a workshop in Greek (by Ioanna Tsakarelou and Stefania Oikonomou) -Web2Learn	Any CHO and OSYGY members	June
4	W2L	A crowdfunding campaign for OSYGY members		June-Oct 2023

2. Cooperation Agreement

The cooperation agreement ([Annex A](#)) defines the mode of cooperation between the CHO institution and the consortium partner for the management of the student's work to develop the   OI   activity.
All cooperation formalities are specified in the agreement:

- Period and modalities: the period of the CHO student's work in terms of the beginning and end of the collaboration must be specified.
- Services: services that can be offered by CHO partners to help students.
- Finance arrangement: in case there is a possibility of financial or other contribution must be specified.
- Intellectual Property: this item regularises the intellectual property of the work done by the student in this collaboration.

This agreement will allow the student or consortium partner staff's position to be adjusted between the CHO Partner and the consortium partner

While the host entity supports this placement, the student or a consortium partner staff shall be under the day-to-day control of the host entity and shall undertake to comply with the working practices of, and take instructions from the host entity.

2.1. Process

Once the Cooperation Agreement has been approved by all partners it will have to be used to regularise the projects defined in Chapter 2.

The development period for these projects will be between May 2023 and November 2023, the deadline for implementing all 24 projects described in Chapter 2.

3. Cooperation Framework

3.1. Scheduling

1) **Establish objectives**: Identify stakeholders and define project objectives, outcomes, and timelines. Identify the purpose of the collaboration and the competencies each partner brings to the project.
2) **Develop a strategic plan**: Outline the objectives in detail, create a project timeline, develop a plan to coordinate partners, and include plans for resources.
3) **Identify legal issues**: Establish the legal framework and identify any laws or regulations that need to be followed.
4) **Identify resources**: Secure available resources, staff, technology and partnerships.
5) **Design methodologies**: Design innovative processes to enhance learning, gather data and share information between both organisations.
6) **Develop an implementation plan**: Break down the project into manageable checklists with a timeline; identify any risks and challenges.

3.2. Monitoring

Monitoring is a procedure that takes place throughout the project implementation phase and is aimed at continuously and systematically collecting information on task progress. It is intended to keep track of the progress achieved by the action undertaken in terms of costs, resources employed, activities carried out and effects

produced. It makes it possible to keep track of the project in the implementation phase and, if necessary, redesign the activities. The results form the information base for subsequent and complementary evaluation activities.

To carry out this task, it is essential that monitoring involves three key moments:

- **project review**: information is acquired to reflect on what is being implemented and to study modifications and adaptations of project activities;
- **re-planning**: the implementation phase of a project always involves deviations from that which was initially planned. It thus becomes essential to plan as the project progresses, adapting it to the reality in which it is being carried out;
- **reporting system (reporting)**: this is a crucial function through which to provide the various stakeholders with up-to-date reports on the progress of the project.

Image 2

The monitoring phase therefore goes hand in hand with the development phase during which regular feedback is given on the activities that are being carried out, helping these to keep in line with the pre-set project characteristics. Some useful questions for monitoring a project are, for example:

- Are the activities being carried out as planned?
- Are there any unintended consequences that arise as a result of these activities?
- Are there elements of the project that need to be changed, and if so what are they?
- What is the impact of these changes?
- Will these corrective actions lead to the expected results?

3.3. Evaluating

Evaluation is a tool for documenting, analysing and refining an ongoing project and drawing a balance once it is completed; it is based on the sources derived from monitoring progress. To evaluate means:

- Reviewing the results achieved by systematically analysing the data collected.
- Checking the results achieved against the initial objectives and success criteria.
- Gaining an overview of the project, completed activities and those that could not be carried out or completed.
- Draw conclusions likely to modify the objectives or the conduct of a second phase of the project or its implementation in another context.

The evaluation process of the PR4 OIPs will focus on their economic and social sustainability to outline key parameters that foster as well as impede the integration of open innovation to small cultural heritage organisations' activities. The evaluation of the OIPs comprises of 3 surveys (PR5A2) that will collect data from participants in three different stages, namely:

- before participating in the project.
- right after its end.
- half a year after the end of the OIP.

The evaluation of the PR4 OIPs takes place under PR5 that will produce a final impact report based on the findings of the evaluation questionnaires.

In addition to this a report of the Open innovation strategy collaboration plan and results will be produced at the end of the period by the student and this will be a shared outcome of the two collaborating entities.

3.4. Reporting

Each OIP will be evaluated based on three sustainability parameters, namely governance, financing and social engagement. The evaluation will be carried out

within PR5, while PR5A2 entails the production of the 3 surveys to be filled in by participants of each OIP. The rationale and methodology based on which the surveys have been developed can be found here.

Below, you will find the 3 surveys that need to be completed at three stages of your OIP.

3.4.1. The pre-OIP survey

You can see here the surveys to be distributed to each target group of your OIP <u>before</u> implementing the project.

3.4.2. The post-OIP survey

You can see here the surveys to be distributed to each target group of your OIP <u>right after</u> the completion of the project.

3.4.3. The post-OIP survey half a year later

You can see here the surveys to be distributed to each target group of your OIP <u>half a year after</u> the completion of the project.

3.5. Quality assurance

The survey tool kit is developed to assist all stakeholders to measure the impact of the OII projects during the PR4 phase of eCHOing collaborations with selected CHOs. Some general guidelines to consider when creating s data surveys in order to collect ideas and feedback from users/visitors/participants are shown below:

1) Ensure a clear definition of the purpose of the survey before creating it. What do you hope to learn from it?
2) Develop survey questions that are clear and concise, as well as applicable to the cultural experience.
3) Include open-ended questions that encourage respondents to provide more detailed feedback. - 25 PR3A1: Draft Methodology eCHOing.eu Recovery of cultural heritage through higher education-driven open innovation.
4) Provide space for respondents to add their own suggestions and/or comments.
5) Tailor questions to various demographics such as age, gender, or ethnicity to better understand how specific groups might experience the cultural event.
6) Ask respondents to indicate what could be done differently or improved when it comes to the cultural experience.
7) Keep the survey short and to the point; the fewer questions, the better.

8) Offer incentives to complete the survey and boost response rates.
9) Allow respondents to answer anonymously, if possible.
10) Follow up with respondents after they complete the survey as necessary.

3.6. Dissemination framework

The dissemination framework describes how factors act to affect dissemination results, showing the relationships between those factors. The main dissemination tools nowadays are social media, but for a dissemination campaign to work properly, these should be set up before the event is completed and properly followed up so that they have, from the first day of the launch, a user base that is useful for propagating the information. Based on the target audience for the project, appropriate social media channels should be selected - YouTube, Twitter, Facebook, Instagram channels. These channels all have a preferential audience and it is important to know how to select the best platforms for promoting the project.

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Useful web resources:

- Il monitoraggio e la valutazione nella realizzazione del progetto: http://fondistrutturali.formez.it/sites/all/files/7.3.1_lo_monitoraggio_valutazione_progetto.pdf
- Il piano di monitoraggio di un progetto: https://twproject.com/blog/it/il-piano-di-monitoraggio-di-un-progetto/
- Metriche di progetto: https://www.humanwareonline.com/project-management/center/metriche-di-progetto/

Annex A

The cooperation agreement (Annex A) defines the mode of cooperation between the CHO institution and the consortium partner for the management of the student's work to develop the OI activity.