



Trainer Manual

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1. Introduction

Why this Trainer manual?

This manual is intended to be used by the trainers involved in the **European Training Pilot Programme** of EUheritage. It has been designed as a practical tool to assist the trainers in understanding handily the main training outputs and outcomes: targeted participants, contents, educational objectives and the training materials.

For a more comprehensive understanding on EUheritage and on the European Pilot Training Programme, the trainers are invited to refer to:

- The **Syllabus**, on the training programme structure and methodology
- The **Handbook**, on the training contents, educational strategy and learning outcomes

The need for a Trainer Manual, stems from the possibility given to the network partners to involve a number of experts in the development of the training. Being part of the partner organisation or external experts, the trainers are invited to make use of the following pages to gain the basic knowledge on the Project objectives and to appropriately prepare and deliver the training outputs.

Key subjects and key concepts

In order to share the main elements that will be used in this document, this section presents the main key words of the training programmes:

Key actors

- *EUheritage «Content Curators»*

partner in charge of the scientific structure of each Module

- *Trainers / Scientific experts*

Subjects in charge of the development of the contents

- *Tutors*

Member of the Contents Curators team in charge of guiding the learners during the training answering to possible questions and animating the community. The objective of the tutor is to ensure that a high percentage of participants complete the EUheritage course until the end. In particular the Tutor view progress of learners, create lesson's forum posts, edit open type assignments/assessments, evaluate users (Training Platform)

- *Technicians*

in charge of the development of the platform

- *Learner/Community Member*

Participants that could view material (Social platform), comment material (Social platform), socializing with other users: use chat, post in forums etc. (Social Platform), run Course(s): View the lesson(s) material run assignments/assessments, complete (successfully) the course, receive certificate (Training Platform)

Key elements of the training

- *Module* are the training thematic area of the training programme. Their contents are developed by specific Content Curators. Each Content Curator has in charge one of them
- *Units* are the content sections into which each module is divided
- *Sub Unit* are the content sections into which each unit is divided

2. The Pilot Training Programmes

The European Pilot Training Programme and the National Pilot Training programme

Objectives

The EUheritage training program offers a professional training for current and future cultural heritage and tourism operators. The training is focused on the “Experience Cycle” as a concept and area of expertise that connects the fields of cultural heritage and tourism to promote a culture-based and integrated approach for local development using also digital strategies and tools.

The EUheritage training program is divided into two complementary trainings. The first is the European Pilot Training Program, which is the object of the present document. It is important for the trainers to know that the EUheritage program entails also the so-called National Pilot Training Program, which will be briefly explained below.

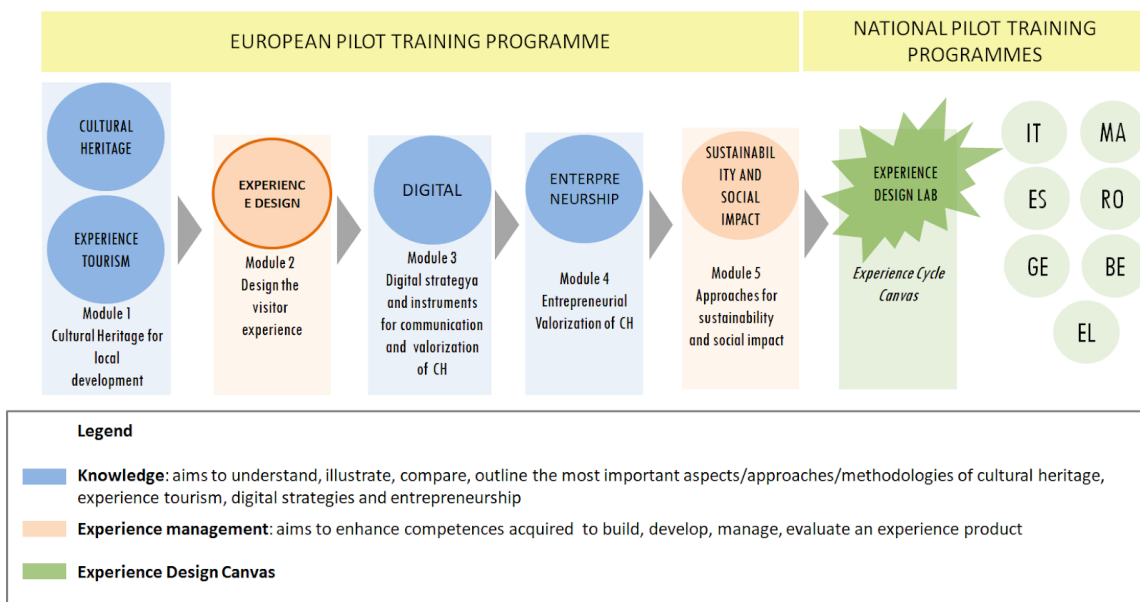


Figure 1. The EUheritage Knowledge and Experience Approach (elaboration: EUheritage Consortium, 2020)

The **European Pilot training program** is a Moodle asynchronous training platform with a European focus made up of 5 modules, 20 Units and 60 Sub-Units. Each module is curated by a partner of the consortium and incorporates a variety of different e-learning activities. It is aimed at providing the necessary **knowledge** for the learner to understand, illustrate, compare and outline the most important aspects, approaches, methodologies, digital online and offline strategies and instruments related to the domains of cultural heritage and experience tourism.

The **National Pilot Training Programs** entails local “**Experience design labs**” taking place in each network country at the end of the European training. Each local program offers the learners the opportunity to learn and experiment with a more hands-on approach by using the *Eu-Heritage Experience Design Canvas*. The aim of the Canvas, an original model developed by the network, is to give participants the opportunity to prototype their innovative experience products for cultural heritage and tourism. The Labs will be developed through a number of

workshops: online, face to face sessions and individual work periods (according to the evolution of the pandemic from COVID-19).

	European Pilot training program	National Pilot training programs
<i>timeline</i>	June - September 2021	October - November 2021
<i>participants</i>	up to 100 in total	8 - 12 for each (7) National Hub
<i>Learning modalities</i>	Online Platform with asynchronous contributions	Live or blended dealing with the pandemic conditions
<i>Participant's profile</i>	post graduate students and professionals	post graduate students and professionals that have already followed the European Pilot training program

Beneficiaries

The goal of the EUheritage Training Programme is to develop a professional profile able **to create and produce innovative experiences for tourists and local communities through the sustainable promotion of cultural heritage and the use of digital tools and strategies to develop cultural participation and relationships with the creative communities.**

The European Pilot Training Program is launched at the European level and aims at addressing 2 main typologies of participants: professionals of the cultural and tourism sector and students and graduates that are interested in working in this field.

The main target groups of the Training Programme can be synthesised as follows:

- cultural heritage managers; UNESCO sites managers; museums managers; cultural foundations managers; cultural centres and facilities managers;
- tourism managers: destination managers, DMOs and its different declinations (from DDMO to DDMMO);
- community managers that are working in territorial contexts being the link between artists and communities;
- education, interpretation and outreach staff, such as outreach & engagement managers and staff; ICT and technology professionals, such as digital experience designers in the field of cultural heritage & cultural tourism; curators; visitors' services staff; community and education engagement staff; communication & promotion staff;
- professionals of the tourism value chain that during their daily activities work to promote cultural heritage;
- professionals working in organisations promoting intangible heritage (e.g. food, traditional festival, traditional music, oral tradition, traditional handicrafts, etc.);
- marketing and fundraising staff working in the field of cultural heritage and cultural tourism.

The second most relevant target groups include:

- SMEs, startups and entrepreneurs working on developing innovative services for cultural heritage and cultural tourism;
- artistic and cultural professionals;

- students and researchers in disciplines including arts, culture, cultural heritage, cultural industries, humanities, economics, business and social sciences, ICT, etc.;

3. The European Pilot Training Programmes

The five Modules

The European Pilot Training Programme consists of 5 thematic online modules. Each module covers a specific topic and has been designed by the content curator to meet with specific learning objectives, as following specified:

Table 1. Modules and learning objectives

Module	Module's title	Learning objectives
Module 1	Cultural heritage and experience tourism for local development	<u>To design, develop and manage</u> development processes creating links and relations between the site / destination and resources (cultural and natural, tourism attractors), cultural heritage (material and immaterial), visitors (tourists, residents and communities in general), stakeholders (territorial, institutional, public and private), cultural heritage and tourism professionals, cultural and creative industries.
Module 2	Design an Innovative visitor experience	<p><u>To evaluate</u> theoretical knowledge and apply the necessary skills required in project management related to designing visitor experiences.</p> <p><u>To identify</u> various methods of identifying visitor attitudes and behaviours as means to strategize on establishing a long-term relationship between the visitor and the cultural heritage space.</p> <p><u>To explain</u> the importance of institutional planning, identifying the salient contents of an effective strategic plan, and providing the necessary information to assist in the creation of a strategic plan.</p> <p><u>To employ</u> qualitative and quantitative research methods adequate for cultural heritage practitioners to understand visitor experience and inform about appropriate visitor experiences. .</p>
Module 3	Digital strategies and tools for cultural heritage	<p><u>To analyse and improve</u> existing digital tools and policies for managing and developing cultural heritage sites.</p> <p><u>To contextualize</u> upcoming and new digital trends with the cultural heritage sector and formulate strategies on how to integrate them through developing own expertise or forming external partnerships</p> <p><u>To plan and design</u> the most appropriate digital approaches to be used according to the goals of the site / destination and of</p>

		<p>the visitor experiences</p> <p><u>To understand, use and apply</u> digital marketing and communication strategies</p> <p><u>To extend</u> digitally-mediated communication and valorization techniques by applying principles of digital brand building.</p>
Module 4	Entrepreneurial approach for cultural heritage	<p><u>To develop and manage</u> experience modules through a more 'business oriented' approach.</p> <p><u>To identify</u> organisational and financial implications of such transformations in cultural organisations through specific approaches as CH branding, with a specific focus on the 'grey' area of interaction between public and private sectors.</p> <p><u>To evaluate</u> the degree of success, consistency and conflicts of the transformation processes.</p> <p><u>To reflect</u> on the role of public, private and not-for-profit sectors and their possible integration in the management of cultural heritage.</p> <p><u>To critically apply</u> the concepts discussed in the module to a specific case study / project work that will be developed during the training programme enhancement of cross-disciplinary approach.</p>
Module 5	Sustainability, impact measurement and project evaluation	<p><u>To contribute to develop</u> the culture of measurement and generation of evidences between cultural heritage professionals (commitment toward sustainability and social impact in this sector)</p> <p><u>To develop capabilities</u> to re-think cultural heritage and cultural tourist activities from the social impacts perspective, including visitors and communities.</p> <p><u>To have a general overview</u> about methodologies, tools and references that could be useful to address in order to design what and how to measure local, regional and national initiatives in cultural heritage. (A selection of methods will be presented)</p> <p><u>To develop "innovative practices"</u>, in an experimental phase, through real local case-studies in EU countries, trying to obtain lessons learnt and recommendations.</p>

3.1.1 The structure of each Module

Each Module consists in 4 content units that have been designed to meet specific learning outcomes. In turn, each unit is composed by 3 thematic sub-units, that gives the opportunity to deepen the contents in relation to the main topics of specific units.

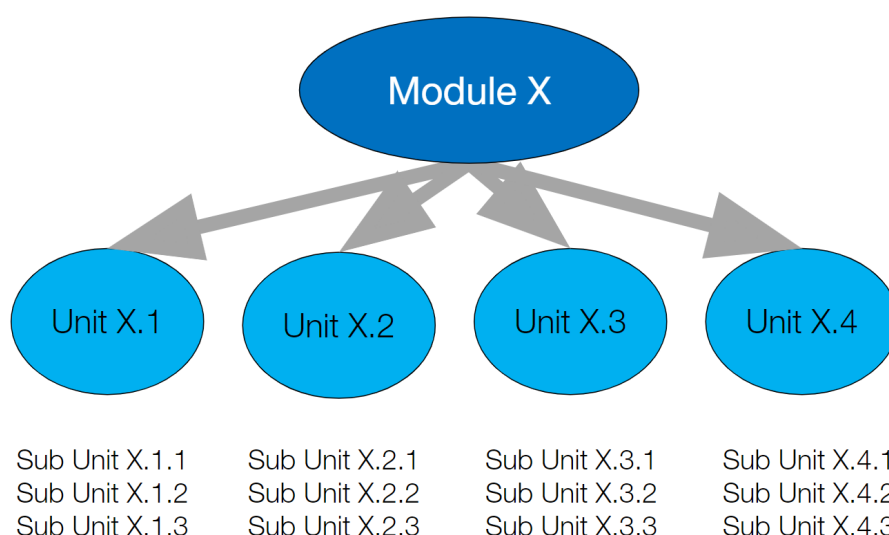


Figure 2. The modules' structure of the EUheritage European Pilot Training (elaboration: EUheritage Consortium, 2020)

The training overview

Here below the table that summarizes the contents of each Module and the structure Units / Sub Units.

Table 2. Modules, Units and Sub Units

Module 1	Cultural heritage and experience tourism for local development <i>Content Curator: Fondazione Fitzcarraldo</i>
UNIT 1.1	Cultural heritage framework
S.U. 1.1.1	Cultural heritage: main dimensions and possible interpretations
S.U. 1.1.2	The recent framework
S.U. 1.1.3	The role of culture in sustainable development goals (SDGs)
UNIT 1.2	From cultural tourism to experience tourism
S.U. 1.2.1	Cultural tourism, trends and main elements
S.U. 1.2.2	New paradigm towards experience tourism: the 'Experience Cycle'
S.U. 1.2.3	Experience tourism: new products and experiences for beneficiaries
UNIT 1.3	New dimensions of cultural heritage and tourism in the recent scenarios
S.U. 1.3.1	Experience tourism and new tourism dimensions post-COVID
S.U. 1.3.2	Case studies and new frontiers of tourism for the well-being of communities
S.U. 1.3.3	The role of temporary communities in the new scenarios
UNIT 1.4	Stakeholder and local development
S.U. 1.4.1	The role of stakeholders for local development
S.U. 1.4.2	The stakeholder management plan
S.U. 1.4.3	Stakeholders in the development of the experience: the testimony of good practices

Module 2	Design an innovative visitor experience <i>Content Curator: University of Malta</i>
UNIT 2.1	Basics of project development
S.U. 2.1.1	Strategic planning initiatives: mission, vision and objectives of the organisation
S.U. 2.1.2	Designing cultural projects: scope and sequence
S.U. 2.1.3	Managing cultural projects
UNIT 2.2	The audience development plan
S.U. 2.2.1	Audience development – an introduction

S.U. 2.2.2	Mission, vision and audience ambitions to create meaningful and engaging experiences
S.U. 2.2.3	Objectives, action and review of designing visitors' experiences
UNIT 2.3	Audience segmentation
S.U. 2.3.1	Audience segments and personas
S.U. 2.3.2	Primary data for cultural and tourism projects
S.U. 2.3.3	Secondary data for cultural and tourism projects
UNIT 2.4	Engaging the audience
S.U. 2.4.1	Engaging existing audiences in cultural heritage sites
S.U. 2.4.2	Engaging new audiences in cultural heritage sites
S.U. 2.4.3	Audience development tools to engage and enhance visitor experience

Module 3	Digital strategies and tools for cultural heritage <i>Content Curators: M2C (with ENCATC and NIRCT)</i>
UNIT 3.1	Understanding the potential of digital data in the context of cultural heritage
S.U. 3.1.1	Understanding the digital environment
S.U. 3.1.2	Recognising, evaluating and training digital skills within the organisation
S.U. 3.1.3	Digital exchange with visitors
UNIT 3.2	New digital strategies and tools for experience-based cultural heritage sites
S.U. 3.2.1	Recent and future trends in the digital field
S.U. 3.2.2	Best practices and case studies
S.U. 3.2.3	Developing digital strategies
UNIT 3.3	Digital marketing and communication for cultural heritage
S.U. 3.3.1	Digital marketing strategies
S.U. 3.3.2	Blogging and using social media in the digital scenarios of the experience
S.U. 3.3.3	User engagement and storytelling
UNIT 3.4	Designing online and onsite digital experiences for visitors
S.U. 3.4.1	The digital experience in the Experience Cycle
S.U. 3.4.2	Designing the digital experience: processes and steps for online and onsite digital initiatives
S.U. 3.4.3	Implementation of the digital experience and approaches for evaluation

Module 4	Entrepreneurial approach for cultural heritage <i>Content Curators: Matera Hub and Hellenic Open University</i>
UNIT 4.1	Entrepreneurship skills as key elements for a new management of cultural heritage
S.U. 4.1.1	Enhancing entrepreneurial competencies within the EntreComp description
S.U. 4.1.2	Recognising, evaluating, and training entrepreneurial skills within the EntreComp description
S.U. 4.1.3	The role of public policies in developing the entrepreneurial and innovation potential of the cultural and creative sectors
UNIT 4.2	Cultural entrepreneurship – What is it?
S.U. 4.2.1	The essential competencies for the cultural entrepreneur
S.U. 4.2.2	Theoretical model: how entrepreneurs develop social and cultural competencies
S.U. 4.2.3	The entrepreneurial ecosystem of cultural and creative industries
UNIT 4.3	Financial management of the cultural heritage and tourism sector
S.U. 4.3.1	Analysing the financial context and defining a sustainable financial plan in cultural heritage and tourism management
S.U. 4.3.2	Implementing a fundraising strategy in the cultural heritage and tourism sector

S.U. 4.3.3	The different financial models & organisational structures for cultural heritage and tourism
UNIT 4.4	Entrepreneurial strategies for innovative cultural heritage and tourism management
S.U. 4.4.1	New sustainable business model for valuable experiences in the cultural heritage and tourism sector
S.U. 4.4.2	The 'lean management' methodology in cultural heritage and tourism
S.U. 4.4.3	A new holistic approach in cultural heritage and tourism management

Module 5	Sustainability, impact measurement and project evaluation <i>Content Curator: la Cultura</i>
UNIT 5.1	Concepts around sustainability and impact measurement
S.U. 5.1.1	The debate on the sustainability in culture as a strategic vision
S.U. 5.1.2	Why measurement matters: steps beyond monitoring and evaluation
S.U. 5.1.3	Social value and the glossary of concepts
UNIT 5.2	Evaluation approaches in culture and tourism
S.U. 5.2.1	Multidimensional and multi-value approaches
S.U. 5.2.2	Challenges and opportunities for measuring culture
S.U. 5.2.3	Design a process for planning an evaluation project
UNIT 5.3	How to do it: impact measurement project for the experience
S.U. 5.3.1	Impact measurement cycle
S.U. 5.3.2	Which kind of data it is important to evaluate: output, outcome or impact?
S.U. 5.3.3	Managing impact and evaluation: building a tailored model
UNIT 5.4	Approaches and methodologies: sustainability and social impact measurement in cultural organisations
S.U. 5.4.1	Measuring sustainability: alignment with SDGs
S.U. 5.4.2	Intervention logic and SMART indicators
S.U. 5.4.3	Monitoring and evaluation methodologies

The learning outcomes

In order to share with trainers the elements that describe the knowledge and the skills that participants should acquire by the end of the European Pilot Training programme, the table below summarises the expected learning outcomes of each Unit.

Table 3. Learning outcomes

Module 1	Cultural heritage and experience tourism for local development <i>Content Curator: Fondazione Fitzcarraldo</i>
UNIT 1.1	Cultural heritage framework <ul style="list-style-type: none"> • LOut1 Know the meaning of cultural heritage in its different dimensions • LOut2 Collect and analyse interdisciplinary approaches and case studies to heritage • LOut3 Interpret the main characteristics of cultural heritage related to its typology • LOut4 Recognise similarities and differences between different definitions and interpretations of cultural heritage • LOut5 Collect and develop narratives highlighting public and private initiatives using cultural heritage as a place of reflection, exchange and creation.
UNIT 1.2	From cultural tourism to experience tourism

	<ul style="list-style-type: none"> • LOut1 Know the main elements for analysing and interpreting tourist phenomena dealing with cultural heritage • LOut2 Know and recall the framework of definitions/interpretations/trends of cultural tourism, looking at authoritative and scientific data and secondary sources • LOut3 Interpret the tourism phenomenon as a territorial experience that combines the visitors needs and the destination's values • LOut4 Recognise and interpret a tourism management process and showcase its cultural heritage in a reasoned way • LOut5 Debate on different tourism products identifying the most important trends and values • LOut6 Know and collect different approaches useful for setting up tourism activities incorporating heritage assets and local know-how • LOut7 Develop heritage experiences combining different forms of cultural expression (dance, music, traditional or new skills, gastronomy, etc.) and appealing to different sides of human nature (senses, feelings, knowledge).
UNIT 1.3	New dimensions of cultural heritage and tourism in the recent scenarios <ul style="list-style-type: none"> • LOut1 Know the main elements for analysing and interpreting tourist phenomenon dealing with post-COVID scenarios • LOut2 Recall the framework of main trends looking at authoritative and scientific data and secondary sources • LOut3 Interpret new paradigms of cultural heritage and tourism in the post-COVID period • LOut4 Recognise and interpret case studies identifying possible approaches, methodologies and tools to be applied in other contexts also • LOut5 Debate on the different dimensions of COVID scenarios.
UNIT 1.4	Stakeholder and local development <ul style="list-style-type: none"> • LOut1 Know and use possible approaches, methodologies and procedures to improve collaboration between the destinations and stakeholders • LOut2 Use approaches, methodologies and procedures to improve relationships between citizens and stakeholders • LOut3 Identify and manage stakeholders by adopting a structured approach and using simple project templates • LOut4 Develop a stakeholder management strategy • LOut5 Interpret varying stakeholder needs and describe how these impact a project, and describe the divergent interests of multiple stakeholders and their competing priorities • LOut6 Analyse, map and develop processes with stakeholders and communities.

Module 2	Design an innovative visitor experience <i>Content Curator: University of Malta</i>
UNIT 2.1	Basics of project development <ul style="list-style-type: none"> • LOut1 Explain the current situation of a cultural heritage institution • LOut2 Describe the necessary steps for implementing a strategic plan • LOut3 Evaluate a plan for progress • LOut4 Identify the necessary coherence between the vision, mission and values of the institution • LOut5 Create a plan on how to execute long and short-term goals • LOut6 Evaluate a plan toward facilitating the execution of specific goals

	<ul style="list-style-type: none"> • LOut7 Apply the generally recognised framework and good practices of project management • LOut8 Apply the project management processes to initiate, plan, execute, monitor, control and close projects and to coordinate all the elements of the project • LOut9 Evaluate the project effectively, including the management of scope, time, costs and quality • LOut10 Apply processes required to manage the procurement of a project, including acquiring goods and services from outside the organisation • LOut11 Evaluate project risk, including identifying, analysing and responding to risk • LOut12 Analyse and manage stakeholder expectations and engagement to ensure a successful project outcome.
UNIT 2.2	The audience development plan <ul style="list-style-type: none"> • LOut1 Evaluate the role of cultural institutions in context • LOut2 Categorise audience trends and apply effective audience development strategies • LOut3 Understand the various components of an audience development plan • LOut4 Identify those qualities that define an effective plan • LOut5 Communicate a complex idea/project effectively • LOut6 Assess one's own intellectual and professional development progress.
UNIT 2.3	Audience segmentation <ul style="list-style-type: none"> • LOut1 Evaluate leading scholarly research related to opportunities and challenges with respect to the profiling and experience behaviour of visitors • LOut2 Describe the internal and external motivators of audience behaviour, crucial when identifying future projects • LOut3 Conduct a variety of tests to provide adequate data collection strategies for future projections • LOut4 Recognise different techniques related to visitor engagement and experience in cultural heritage settings • LOut5 Identify, analyse and use different types of data dealing with visitor behaviour. This learning outcome is covered by the one before and the one following • LOut6 Apply different techniques of visitor profiling using a variety of data measures • LOut7 Evaluate leading scholarly research related to opportunities and challenges with respect to visitor flow.
UNIT 2.4	Engaging the audience <ul style="list-style-type: none"> • LOut1 Evaluate leading scholarly research related to opportunities and challenges with respect to the profiling and experience behaviour of visitors • LOut2 Evaluate data in a scientific manner and compile a professional report for informed future decision-making purposes • LOut3 Understand basic models that inform the mapping of important components of the engagement mix and experience design • LOut4 Understand the importance of effective communication towards an audience-centred approach • LOut5 Explore examples of effective communication and reflect on the strengths and limitations of these options • LOut6 Identify methods of engagement for both existing and new audiences as a means to inform experience design.

Module 3	Digital strategies and tools for cultural heritage <i>Content Curators: M2C (with ENCATC and NIRCT)</i>
UNIT 3.1	Understanding the potential of digital data in the context of cultural heritage <ul style="list-style-type: none"> • LOut1 Understand fundamental notions related to the digital environment, such as digital data creation, use, transformation and storage, and their applications in cultural heritage related contexts • LOut2 Apply sound digital data management policies in order to protect and maximise digital use of cultural heritage data • LOut3 Assess legal and ethical implications of digital data use in activities engaging in the enhancement and communication of cultural heritage • LOut4 Evaluate the digital capacities of an organisation of cultural heritage • LOut5 Correlate the visitors' digital skills and needs with the planned digital output of a cultural heritage organisation (social media presence & digital enhancement of the cultural heritage)
UNIT 3.2	New digital strategies and tools for experience-based cultural heritage sites <ul style="list-style-type: none"> • LOut1 Know the main characteristics (potentials, requirements and limitations) of the digital technologies used in the enhancement and mediation of cultural heritage • LOut2 Assess current developments and trends in the digital field in order to extract what might be relevant for the cultural heritage sector and the individual context • LOut3 Derive optimum requirements for the future set up of digital projects from study cases/examples • LOut4 Develop long-term digital strategies in order to utilise the most recent or future digital trends through targeted collaborations.
UNIT 3.3	Digital marketing and communication for cultural heritage <ul style="list-style-type: none"> • LOut1 Identify the main features of a digital marketing strategy • LOut2 Evaluate the characteristics of the main digital channels available for cultural heritage promotion • LOut3 Plan content for the website and the appropriate social media channels that can be adjusted to defined target groups • LOut4 Analyse the role and characteristics of storytelling as a key competence of e-marketing • LOut5 Plan user engagement strategies for a specific cultural heritage site.
UNIT 3.4	Designing online and onsite digital experiences for visitors <ul style="list-style-type: none"> • LOut1 Understand the role and place of digital experience in the Experience Cycle • LOut2 Evaluate the potential for the digital enhancement and interpretation of a cultural heritage site • LOut3 Design digital experiences for mediation, education and inclusion • LOut4 Plan the implementation of the digital experience • LOut5 Establish suitable evaluation criteria for the digital experience.

Module 4	Entrepreneurial approach for cultural heritage <i>Content Curators: Matera Hub and Hellenic Open University</i>
UNIT 4.1	Entrepreneurship skills as key elements for a new management of cultural heritage <ul style="list-style-type: none"> • LOut1 Know the meaning of entrepreneurship within the lifelong learning framework • LOut2 Describe the broad concept of entrepreneurship for the cultural sector in ten words • LOut3 Recognise similarities and differences between entrepreneurship for profit and nonprofit cultural organisations • LOut4 Identify the rationale and scope of the Entrepreneurship Competence Framework • LOut5 Analyse three competencies from each of the areas of EntreComp as the ability to turn ideas into action • LOut6 Know the meaning of the Cultural Entrepreneurship initiative • LOut7 Evaluate the most suitable competencies from the fifteen competencies of EntreComp, according to the needs of cultural heritage professionals.
UNIT 4.2	Cultural entrepreneurship – What is it? <ul style="list-style-type: none"> • LOut1 Understand the concept of cultural entrepreneurship • LOut2 List at least three essential skills for a cultural entrepreneur • LOut3 Name at least one theoretical example of how entrepreneurs develop cultural competencies • LOut4 Interpret the concept of the entrepreneurial ecosystem • LOut5 Identify at least three actions towards the strengthening of the creative industries' ecosystem • LOut6 List at least four environmental attributes crucial to the development of an entrepreneurial ecosystem • LOut7 Understand the European Capitals of Culture initiative.
UNIT 4.3	Financial management of the cultural heritage and tourism sector <ul style="list-style-type: none"> • LOut1 Analyse the financial context of the tools in the cultural heritage and tourism sector needed for sustainable fundraising strategies • LOut2 Understand the different funding sources available in the cultural heritage and tourism sector and the importance of the role of fundraising in the cultural heritage sector • LOut3 Familiarise oneself with financial literacy and financial management • LOut4 Identify fundraising strategies and methodologies • LOut5 List at least three steps of the fundraising process • LOut6 Develop a critical sense on diverse business models • LOut7 Compare contemporary case studies in the cultural heritage and tourism sector.
UNIT 4.4	Entrepreneurial strategies for innovative cultural heritage and tourism management <ul style="list-style-type: none"> • LOut1 Identify marketing strategies for the cultural heritage and tourism sector • LOut2 Test at least two methodologies to develop a sustainable business model • LOut3 Elaborate a marketing plan for cultural heritage and tourism organisations • LOut4 Measure the impact of the 'lean management' strategy on the cultural heritage and tourism sector • LOut5 Compare different management strategies in the cultural heritage and tourism sector

	<ul style="list-style-type: none"> • LOut6 Recognise the emergence of social entrepreneurship and its influence on the cultural heritage and tourism sector • LOut7 Assess new management tendencies.
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Module 5	Sustainability, impact measurement and project evaluation <i>Content Curator: la Cultuora</i>
UNIT 5.1	Concepts around sustainability and impact measurement <ul style="list-style-type: none"> • LOut1 Summarise the main notions of the sustainability paradigm in the context of professional performance in culture • LOut2 Relate how sustainability influences the strategic vision of institutions and shapes the definition of values and vision • LOut3 Recognise the key elements in which the generation of evidence is aligned with the strategy of the cultural institution within the vision of sustainability • LOut4 Summarise global trends in social impact measurement and understand the added value of these practices • LOut5 Evaluate the most significant resources and the most outstanding professionals from the examples and trends analysed • LOut6 Discern how measuring social value impacts the strategic vision of sustainability • LOut7 Identify the terminology required to create a social value measurement project.
UNIT 5.2	Evaluation approaches in culture and tourism <ul style="list-style-type: none"> • LOut1 Summarise the key international documents on sustainability, in particular those related to cultural heritage • LOut2 Recognise examples of measurement of culture in different professional contexts • LOut3 Identify references made to them in local, regional and national initiatives • LOut4 Search for examples of application with different perspectives within cultural heritage • LOut5 Recognise the entry barriers in different areas, in particular in the management of cultural heritage • LOut6 Construct a mind map of the theoretical process for building a sustainable measurement culture with a long-term vision • LOut7 Describe the professional training journey for reaching the state of knowledge and the competencies for developing a measurement project.
UNIT 5.3	How to do it: impact measurement project for the experience <ul style="list-style-type: none"> • LOut1 Explain the difficulties in transferring the macro vision into the structure of an institution or a cultural project • LOut2 Construct the necessary process for developing a project of social impact indicators through the available tools of the measurement cycle • LOut3 Evaluate the key phases of the measurement cycle for each specific project, and to identify the information and resources needed for development • LOut4 Distinguish between different methodologies according to the different strategies for data collection • LOut5 Recognise operational tools related to the different stages of the measurement process to generate data and evidence • LOut6 Distinguish between conducting the data collection of a specific activity and creating a culture of measurement in an institution.
UNIT 5.4	Approaches and methodologies: sustainability and social impact measurement in cultural organisations

	<ul style="list-style-type: none"> • LOut1 Relate the gaps in management with opportunities and challenges that can be faced through the measurement of social impact • LOut2 Organise specific professional interests with respect to the measurement culture and within a selected area of work • LOut3 Discuss the feasibility of tools for the selected project or challenge • LOut4 Select a measurement process and the key tools to carry it out through the chosen case study • LOut5 Evaluate data obtained from real case studies, in an attempt to obtain lessons and recommendations.
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The proposed educational strategy

The development of each Module has followed a shared educational strategy. The importance of having a unique educational strategy stem from the opportunity to develop content in the same way for all Modules. The learner will find in each Module specific learning outputs that have been designed by each content curators:

- Video presentations, including lectures and interviews
- Text-based contents including case studies, best practices and real-world examples
- A collection of open educational resources: reports, research studies, articles, policy papers and other materials for self-studying
- Bibliography and webography on primary and secondary sources of reference
- Self-assessment through quizzes

The following paragraphs will also explain the materials that have been developed for each Subunit.

The EUheritage platform

In order to support on the one hand, the social functionalities and on the other hand e-learning activities, two platforms have been developed:

- A Moodle platform that will host all the e-learning activities
- A Drupal (8.0) platform where the social activities will be developed (<https://www.drupal.org/8>)

The EUheritage learning platform will contain the training materials produced, OERs, links to OERS of other similar projects, reports and studies of other EU projects in the field of cultural heritage, technology, sustainability and innovation.

The EUheritage Social Platform will serve as an online domain to create Communities of Practice (CoPs). The CoPs are organised groups of people who have a common interest in a specific technical or business domain. They collaborate regularly to share information, improve their skills, and actively work on advancing the general knowledge of the domain.

The structure of the e-learning platform has been designed by HOU – Hellenic Open University (source: Deliverable WP5)

Materials to be developed by trainers

The Learning Outputs

The online course is composed of a total of:

- 60 videos (12 per each Module)
- 60 texts video transcriptions (12 per each Module)
- 60 PPT presentations (12 per each Module)
- 60 bibliography / sitography (12 per each Module)
- up to 200 OER (up to 40 OERs per Module)
- 60 quizzes

The **video lecture** is the first learning content at disposal for the learner. Each video lasts between 8 and 15 minutes and it is aimed at introducing the learner to an overview on the main contents of the sub-unit. Definitions, data, schemes, images and photographs are provided. Each video is accompanied by the transcription to ease the comprehension of contents.

The second learning output that is mandatory to all content curators is the **Power Point presentation**: around 30 slides per sub-unit deepening the information synthesised during the video introduction, by reporting keywords, case studies, tips, open questions, list of references etc.

The learner will find at disposal also a number of relevant Open Educational Resources (OERs) that have been chosen by the content curators in relation to the specific learning outcomes of each Unit. The selected OERs are included in the course as additional study material and need to be registered under a Creative Commons license.

For the purpose of this project, we use OERs Commons' definition: "*Open Educational Resources (OER) are teaching and learning materials that are freely available online for anyone to use, whether you are an instructor, student, or self-learner. OER can exist as smaller, stand-alone resources that can be mixed and combined to form larger pieces of content, or as larger course modules or full courses*".

Enriching the MOOC with OERs as further learning material has many benefits, among them, the possibility to customize the course by going in depth with specific topics relevant for some participants, the chance to have further perspectives on certain issues, the stimulus to seek further OERs and autonomously deepen certain themes, the gaining knowledge on relevant and valuable sources of learning.

The availability of OERs via the EUheritage platform contributes, at the same time, to spread knowledge to a wider audience and enhance the possibility to open online discussions and reflection on cutting edge issues.

Within EUheritage, content curators and scientific experts collect relevant OERs by:

- a) Selecting properly licensed OERs (registered under Creative Commons license);
- b) Creating their own OERs (or suggest resources they have created in other contexts) if properly licensed;
- c) Modifying OERs if the licensing scheme so permits.

At the end of each Module, the learner will have the possibility to take a quizz made of 40 questions (10 per unit). The quizzes are multiple choice or true / false. Upon completion of the online course and with a success rate of 45%, learners will be able to achieve the Certificate of Completion: the open badges will be awarded to learners after the successful completion of each Module.

In the phase of content development, each content curator/expert will **follow specific instructions and use templates provided by the consortium**. The instructions on how to develop content (videos, textual material and power point presentations) has been created by HOU, while the templates have been crafted by ENCATC. Instructions, guidelines and the links where to download the templates can be found in the following annexes.

ANNEXES

Annex 1 – PPT Guidelines

(source: Deliverable “Design and development of online learning materials – Structural guidelines for online distance learning presentation”)

Structural guidelines for online distance learning presentation

For a presentation to be useful as an online distance learning resource, it should contain some of the following elements (elements marked with an * are considered mandatory):

1. Elements at the start of the presentation
 - a. Title slide *
 - b. Aim / objectives *
 - c. Learning outcomes *
 - d. Keywords *
 - e. Table of contents
2. Elements in the body of the presentation
 - a. Sections / sub sections *
 - b. Tables / Graphs / Figures
3. Elements at the end of the presentation
 - a. Synopsis
 - b. List of references
 - c. Further reading
 - d. Trainers’ bio
 - e. Thank you / Credits *

Following, each of these elements is briefly explained. It is assumed that each presentation is accompanied by narration.

Title slide (1 slide)

Shows the title of the presentation, together with contextualization information (e.g. module / unit it belongs to). The name(s) of the trainer(s) could also appear here.

Aim / objectives (1 slide)

The aim provides a brief explanation of the general contribution of the presentation. The objectives specialize the aim using more concrete terms. A brief introduction to the topic of the presentation could be provided here, too.

Learning outcomes (1 slide)

They describe the knowledge / skills / competences (attitudes) that the learner will develop after

watching the presentation. They should be based on Bloom’s taxonomy and specialize some of the learning outcomes of the module. Should be introduced as: After studying this resource, you will be able to: (followed by a list of outcomes). The list should contain about 5 learning outcomes

(approximately).

Keywords (1-2 slides)

A set of keywords that provide the main terms used in the document, together with a brief

explanation. The list should not contain more than 10 terms; 6 is a good number.

Table of contents (1-2 slides)

Provides an overview of the presentation contents. If the presentation contains sections and sub- section, they should be mentioned here, together with the main slide titles of each. This is an alternative location for a brief introduction to the topic of the presentation.

Sections / subsections

Make up the body of the presentation. In general, the main content of the presentation should be structured in a way that allows it to be viewed in non-sequential (i.e. the learner can jump to any subsection) and modular (i.e. the learner can stop at the end of a section and continue later) ways. The entire presentation and each section could be preceded by an introduction.

Tables, figures and graphs

Better be placed next to the text, or in a stand-alone slide (no text). Avoid placing text in random positions around graphical elements. Should be large enough to be legible.

Synopsis (1 slide)

Is placed at the end of the presentation and summarizes its contents and the learner's achievements from watching it.

List of references (1 slide)

Contains the list of resources used in the presentation. Use either APA or IEEE style. Even if references are also placed in the slides that make up the body of the presentation, they should be summarized at the end as well.

Further reading (1 slide)

Provides selected resources (OERs) for further reading. For each resource, provide its reference (using APA or IEEE style) and a brief summary (no more than 5 lines).

Trainers' bio (1 slide per trainer)

Ideally, the trainers should present themselves. This can be done either in the beginning (i.e. after the title slide) or at the end of the presentation. A short textual bio with a photo should be shown, while each trainer speaks briefly about him/herself in first person (i.e. Hello, I am ... and, in this presentation, we shall ... - tenses should be adapted accordingly).

Thank you / Credits (1 slide)

Thank the learner for watching the presentation. Show the names of the contributors to the presentation (i.e. author(s), reviewers (technical and scientific), narrator(s), visual effects creator(s) and contact details if further communication from the learner is necessary. Also shows the licensing mode and takes into account the EU publication requirements.

Templates

The network has prepared a number of **templates for powerpoint presentations**.

The templates can be downloaded at this link:

<https://drive.google.com/drive/u/1/folders/1t8GFyqwCX8ZfEoK9ZkJe- pPzXj-1Vod>

Annex 2 – Textual material Guidelines

(source: Deliverable “Design and development of online learning materials – Structural guidelines for online distance learning presentation”)

Structural guidelines for online distance learning textual material

For a document to be useful as an online distance learning resource, it should contain some of the following elements (elements marked with an * are considered mandatory):

1. Elements at the start of the document

- a. Aim / objectives *
- b. Learning outcomes *
- c. Keywords *
- d. Introduction
- e. Pre-requisite knowledge
- f. Table of contents / figures / tables

2. Elements in the body of the document

- a. Sections / sub sections *
- b. Tables
- c. Figures
- d. Examples
- e. Case studies

3. Elements at the end of the document

- a. Synopsis
- b. List of references
- c. Glossary
- d. Further reading

In the following, each of these elements is briefly explained.

Aim / objectives

The aim provides a brief explanation of the general contribution of the document. The objectives

specialize the aim using more concrete terms. This element should not exceed 5 lines of text.

Learning outcomes

They describe the knowledge / skills / competences (attitudes) that the learner will develop after

studying the document. They should be based on Bloom's taxonomy and specialize some of the learning outcomes of the module. Should be introduced as: After studying this resource, you will be able to: (followed by a list of outcomes). The list should not contain more than 10 outcomes; 5 is a good number.

Keywords

A set of keywords that provide the main terms used in the document. Note that for each of these

terms, an explanation should be provided in the text and they could be summarized in the glossary. The first appearance of a term should be easily identifiable (i.e. using boldface). The list should not contain more than 10 terms; 6 is a good number.

Introduction

Introduces the reader to the contents that will follow. Places the resource in context and associates it with any previously learned material (if applicable). Also summarizes the resource contents. Should be used only for medium-sized and long documents (i.e. more than 4 pages). Should not exceed 10% of the total length of the document.

Pre-requisite knowledge

Lists the knowledge and skills which are necessary in order to make optimum use of the resource. May not be used for short or medium-sized documents. Could be part of the introduction. Should not exceed 10 lines of text.

Table of contents / figures / tables

Provides an overview of the content and allows direct access to parts of the document. Should be used only for long documents (i.e. more than 12 pages).

Sections / subsections

Contain the body of the document. Should be structured in paragraphs. Avoid using more than 3 levels. Should be numbered.

Tables, figures and graphs

Tables and graphs are used to summarize and provide an overview text contents. Figures usually amplify or extend the text. Better be placed within the text or at the marginal space (if enough space is provided); better avoid wrapping text around them. Should be placed within a frame. Should be large enough so to be legible. Should always be numbered and have a caption. When referenced from the text, one should write “in figure 1”, never write “in the following figure”. In case the document will be printed, one should be careful with the use of colors (and the references made to them).

Examples

Are used to contextualize or personalize a part of the document. Should be placed within a frame. Should always be numbered and have a title. When referenced from the text, one should write “in example 1”, never write “in the following example”.

Templates

The network has prepared a **template for textual materials**.

The template can be downloaded at this link:

https://drive.google.com/drive/u/1/folders/1C_YB1Chcm9S5rX4vwGZu9bbMXLUeE-ul

Annex 3 – Video Guidelines and Demo

(source: Deliverable “Design and development of online learning materials”)

The most common video types, related to educational content, include interviews, conversations, lectures, directed scenarios and screencasts.

Videos

Interview

An interview¹ is a conversation including questions and answers. A person (the interviewer) asks

predefined questions, while the invited persons (interviewees) respond (usually within predetermined time), with participants talk in turns. Interviews usually involve a transfer of information from the interviewee to the interviewer (and therefore to the audience), which is usually the primary purpose of the interview. Slides can also be inserted (in a presentation form) or images, while the interviewee speaks, in order to make the response more conceivable.

Conversation

A conversation² is an interactive communication between two or more people on a specific subject. In conversations, we can also add slides (in presentation form) or images, in order to make the speaker more understandable.

Lecture

A lecture³ is an oral presentation with the purpose to present information, or teach people or learners a particular subject, usually using slides in presentation form or images.

Directed scenario

This type of video usually refers to a presentation of a specific object. For example, it presents an exhibit (a painting, a sculpture, etc.) in a museum, a sightseeing, an experiment, etc. Usually it includes also audio narrations for the pictures presented. Actors or speakers can be included (optionally) so as to make the presentation more vivid.

Screencast

A screencast⁴ (also known as a video screen capture) is a digital recording of the computer screen

output, containing often also audio narration. The term screencast is compared to the related term screenshot; whereas screenshot generates a single picture of a computer screen, a screencast is essentially a movie of the changes over time that a user sees on a computer screen, enhanced with audio narration.

Technical tips

General

¹ <https://en.wikipedia.org/wiki/Interview>

² <https://en.wikipedia.org/wiki/Conversation>

³ <https://en.wikipedia.org/wiki/Lecture>

⁴ <https://en.wikipedia.org/wiki/Screencast>

- The shooting should preferably be done using two identical cameras at the same time; one for a close-up shot and one for a medium shot (from waist up). Make sure to arrange the same settings to both cameras (ISO, White Balance, fps, aperture, shutter speed).
- Keep your videos up to 15 minutes maximum (without cuts) in total, in order to keep the audience interested. If it is not possible to film for 15 minutes straight, split the video in two parts.
- The frame rate should be set at 25fps.
- Avoid camera movements.
- Capture should focus on the trainers and keep the camera on eye-level.
- Do not change the video settings or lighting during recording.
- Avoid echoing. Before you start recording, check the acoustics of the place.
- It is necessary to clap (hands or with a clapper) in the centre of the frame after you make sure that the camera and the sound are rolling. Before clapping, the camera operator or the director should say clearly the title of the interview and the clip (for example “Marketing 2.1, take 1”).
- The slides of the presentation should not appear in the frame of the video; they will be added later during video editing. During the recording of the lecture the cameras should focus on the lecturer.
- Sound should be recorded using lavalier microphones, which are connected with the camera.

For the Trainers

- Trainers should use simple language, without complex terms. If they have to use a complex term, they should explain it briefly.
- Trainers should avoid wearing: white, black, brands.
- When there is only one trainer, he/she should focus their look into the camera.
- Trainers should not speak quickly and not hold anything in their hands.
- Trainers should not speak too close or too far from the microphone. Make sure that each speaker's voice sounds clearly.
- They should have prepared their speeches and read them through autocue (there are online applications⁵). All questions and answers should be written down and rehearsed before the shooting.
- The trainer may choose if he/she wants to speak standing up or seated down.
- In case we want to add graphics on the side of the frame, the trainer should stand/ sit on the right half of the frame.
- The make-up should be plain and discreet. Likewise for the hair.

Background – Space

- The background should be empty and of a bright colour for graphics in white colour, or of a dark colour in case of graphics in black colour. Avoid backgrounds with designs / patterns or objects.
- There should be lots of light making sure that no intense shadows are created on the trainer or on the background. The face should look clear and bright.

⁵ Examples: <https://www.cueprompter.com/>; <http://www.freeteleprompter.org/>

- Avoid or eliminate external sounds. Please record in isolated places or in a studio. However, if you choose to shoot at an exterior space, make sure that it is not too noisy and no people interfere in the frame. An exterior shooting should be done only in case a professional is in charge.

Footage

- The footage should be sent without any editing (no logos, no intro/outro, no music)
- The footage of the shooting should be sent accompanied by the text of the speech and the “ppt” presentation or any other material that needs to be showed (video/ image etc.) stating when it should be displayed.

Miscellaneous Tips

- The educational material should be self-guided and enhance learner’s interaction with the material.
- It should include explanatory examples and encouraging comments.
- At the beginning of each section, definition of the goals and the expected learning outcomes should be contained, as well as a synopsis at the end.

Template: Video Demo

The network has prepared a demo of the video lecture for the trainers to have an idea of the final product.

The video can be seen at this link:

<https://drive.google.com/file/d/1pyqLm-MntvRSMMrceMhRth7W4-KWX-Zk/view?usp=sharing>



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