



EUHeritage.

Skills for promotion,
valorisation, exploitation, mediation and
interpretation of European Cultural Heritage

EUheritage Handbook



Co-funded by the
Erasmus+ Programme
of the European Union

Contract no.: Project number: 601073-EPP-1-2018-1-IT EPPKA2-SSA

Project acronym: EUHERIT

Work package no.: 4.

Deliverable name: Users Handbook

Deliverable no.: 4.4

Distribution level: Confidential

Contractual month of submission (of 1st version): M23 [Final version]

Real month of submission (of 1st version): M14 [Draft version].

Date of submission of this version:

Version no.:

Number of pages:

Project partner responsible: Fondazione Fitzcarraldo

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1. European Training Programme Structure

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 Cultuora</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

2. The Modules

MODULE 1 | Cultural heritage and experience tourism for local development

Module description

Module 1 aims to offer a theoretical framework on the meanings and the existing links between cultural heritage and experience tourism. Through the analysis of academic and institutional references, trends and case studies, Module 1 analyses these main topics, but also transversal issues connected with them, such as, for example, stakeholder management.

The final objective is to give practitioners the ability to identify, discuss and elaborate the main dimensions and relationship between cultural heritage and 'experience tourism' in terms of sustainability, community engagement, stakeholder involvement, and local development.

A part of the module also engages the main new scenarios emerging from the COVID-19 pandemic.

A further part of this module is dedicated to case studies on new trajectories of cultural heritage and experience tourism, such as the emergence of new products (accessible tourism, enogastronomic tourism), and interesting approaches of governance that put at the forefront the role of the arts in improving health and well-being.

Educational strategy

- 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

UNIT 1.1 | CULTURAL HERITAGE FRAMEWORK

Description

The aim is to give to the participants some definitions and approaches on cultural heritage and its relation with the territorial and cultural communities. Starting from the definitions and the

typologies of cultural heritage (given by institutional and scientific institutions), the unit focuses on the approaches recently proposed at European and international level (for example, by the St21 European Cultural Heritage Strategy for the 21th Century, The 2030 Agenda for Sustainable Development, Culture 2030 Indicators, recommendations from the European Year of Cultural Heritage, SDGs etc). The aim is to propose an approach that goes beyond the conservation and safeguarding of monuments, towards a more inclusive process investigating core components of cultural heritage that consider citizens, communities, operators and visitors.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 1.1.1 – Cultural heritage: main dimensions and possible interpretations

This sub-unit tackles the main dimensions of cultural heritage. Starting from the international definitions (for example from UNESCO, ICOM and ICOMOS) and going through the innovative reflections proposed by the Faro Convention – innovative both in the conception and in the modality of protection, safeguard and enhancement of cultural heritage – this sub-unit aims to identify the main aspects of cultural heritage in terms of material and immaterial elements.

The aim is to identify the main elements that characterise cultural heritage in terms of typology, values, and relationship with the cultural and territorial communities.

S.U. 1.1.2 – The recent framework

This sub-unit proposes an overview of the most important and recent reports, documents and recommendations in the field of cultural heritage. From the New European Agenda for Culture, to the European Year of Cultural Heritage, and from the St21 European Cultural Heritage Strategy to the European Capital of Culture initiative, the sub-unit follows the reflections of

Sub-unit 1, identifying possible dimensions connected to cultural heritage in terms of relation with the communities, social participation, governance and local development.

S.U. 1.1.3 – The role of culture in SDGs

In September 2015, the United Nations General Assembly adopted the ‘2030 Agenda for Sustainable Development’, with seventeen ambitious, universal goals focused on quality education, sustainable cities, environmental respect, economic growth, sustainable consumption, peaceful and inclusive societies, gender equality and food security.

Culture has a crucial role to play in SDGs: all of them can be considered in some way relevant to culture, either directly (culture as a driver of sustainable development) or indirectly (culture as an enabler), as described in several publications published since the adoptions of SDGs. At the same time, cultural rights, heritage, diversity and creativity are core components of human and sustainable development. Related to this topic, the sub-unit focuses in particular on SDG nos. 4, 8, 11 and 13.

The Culture 2030 indicators developed by UNESCO will also be taken into consideration.

UNIT 1.2 | FROM CULTURAL TOURISM TO EXPERIENCE TOURISM

Description

Since the travel of persons away from their normal place of residence to cultural attractions is triggered more and more by the desire to gather new information and experiences to satisfy cultural needs, cultural tourism is strictly connected with the possibility of ‘living an experience’. This experience doesn’t begin merely when the visitors arrive at the destinations, but starts before the arrival and ends with the recollections of reflections in the post-visit phase and plans for future visits. The unit introduces the relationship between cultural heritage and tourism, describing the evolution of the tourism phenomenon toward the concept of experience. Combining the theories of the economy of the experience with the recent approaches related to ‘experience tourism design’, the unit offers an overview on recent trends, scientific approaches and reflections on the evolution from cultural tourism to experience tourism.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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).

SUB-UNITS

S.U. 1.2.1 – Cultural tourism, trends and main elements

This first sub-unit aims to introduce the topic of tourism, starting from a brief overview of the main definitions to identifying the main aspects of cultural tourism in terms of its main dimensions and trends.

The tourism management components will also be tackled in relation to the destination choice process.

A final part will be dedicated to case studies used as examples of cultural tourism in national heritage.

During this sub-unit, there is also a focus on data and secondary sources for analysing and interpreting the phenomenon.

S.U. 1.2.2 – New paradigm towards experience tourism: the Experience Cycle

Dealing with the topic tackled in the previous sub-unit, this part will focus on the actual transition from the traditional concept of cultural tourism to the recent one that proposes a possible interpretation related to so-called ‘experience tourism’.

Starting from the interpretation given by the experience economy, this sub-unit analyses the main dimensions of experience tourism related to the demand and supply side of a tourism system, arriving at the recent approach of the ‘Experience Cycle’.

S.U. 1.2.3 – Experience tourism: new products and experiences for beneficiaries

Experience tourism strengthens the debate, on the one hand, on the new behaviour of visitors in travels and in the possibility to ‘live’ a destination and, on the other hand, reinforces the links between the territorial destinations and the tourism products that might interact for the development of the experience tourism process. The sub-unit suggests some conversations with experts that are working on these topics, such as, for example, enogastronomy, accessible tourism and slow tourism.

UNIT 1.3 | NEW DIMENSIONS OF CULTURAL HERITAGE AND TOURISM IN THE RECENT SCENARIOS

Description

From the lockdown experience of this moment and the evolution of the COVID-19 pandemic in the world, it can be assumed that the possibility of return to normality (in whatever way and to what extent this will happen) will take time.

In this context, new paradigms of interpretation of the cultural and tourist phenomenon are necessary in order to rethink the products, the demand, the offer and the policies to relaunch destinations and sites.

In particular, the combined effect of safety measures and sanitary regulations in experiential tourism gives rise to an explosion of specific local experiences that are highly differentiated in terms of inclinations, origins, cultures and seasonality. This implies a revolution in the business model both in the supply value chain and in the tourism demand processes.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 1.3.1 – Experience tourism and new tourism dimensions post-COVID

This sub-unit will focus on the main phenomenon emerging from the COVID-19 pandemic on the tourism sector: from the 'staycation' to 'under-tourism', from the dimension of proximity to value tourism, this sub-unit suggests some possible reflections of this new reality together with data and statistical information dealing with tourism trends and new scenarios.

In this sub-unit, the role of tourism in boosting community participation, in putting at the forefront the experience of visitors, and in experimenting with the use of digital tools to overcome the limitations imposed by the COVID-19 pandemic, is highlighted and studied.

S.U. 1.3.2 – Case studies and new frontiers of cultural heritage and tourism for the well-being of communities

As the 'United Action for Better Health in Europe' (WHO, 2020) underlines, it is important to develop guidelines to enhance the readiness of health systems to respond to the COVID-19 pandemic, and any other health emergencies, within a universalistic care approach. In this

context, it is essential to reflect on, trigger and develop a 'strategic intelligence' to promote well-being and health, and combat inequalities not only in our own communities, but also in territorial and cultural contexts aimed at welcoming temporary citizens.

Within this framework, the sub-unit reflects on the relationship between cultural heritage, tourism and well-being in terms of potential contexts in which to experiment with new processes, formats and models wherein the well-being and quality of life of citizens and visitors is taken into consideration, aiming at an empowerment of operators and communities, also in contexts of fragility.

S.U 1.3.3 – The role of temporary communities in the new scenarios

The sub-unit focuses on the concept of 'temporary citizens' as an approach to the relationship between community and visitors: a way to feel like co-constructors of a new idea of community in which the focus is no longer the place, but the people who bring the place itself to life.

The sub-unit proposes a new way to look at the phenomenon of tourism (often perceived as an increasingly invasive and gentrifying element) as a parameter of a new sociality, developed on the ability to live more dynamically with the continuous migrations to which life pushes us.

UNIT 1.4 | STAKEHOLDER AND LOCAL DEVELOPMENT

Description

Strategic projects in culture and tourism need more and more cross-cutting, horizontal approaches with the ability to involve different sectors, and vertical processes to collaborate with all levels of the organisation. In this context, recognising an important value to cultural heritage as a driving force for development means acting on the propensity of cultural communities, organisations, destinations and sites, to 'create a system' at territorial level that intertwines the various local stakeholders. The sub-unit proposes some approaches, methodologies and tools to involve tourism and cultural communities/organizations/destinations/sites with a specific focus on the strategic management plan.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 1.4.1 – The role of stakeholders for local development

The sub-unit focuses on the role of stakeholders in bottom-up or top-down processes of local development, focusing on some examples.

S.U. 1.4.2 – The stakeholder management plan

The sub-unit proposes some approaches, methodologies and tools for involving tourism and cultural communities, organisations, destinations and sites, both between their own departments and also with other actors in the local area. This sub-unit focuses also on the different types of public and private entities and institutions that contribute to creating a territorial system focused on tourism and cultural heritage. The sub-unit introduces some stakeholder management tools such as the Stakeholders Analysis, Understanding Stakeholder Behaviour Styles, Identifying Stakeholder Needs, Securing Stakeholder Agreement and On-going Stakeholder Management.

S.U. 1.4.3 – Stakeholders in the development of the experience: the testimony of good practices

The sub-unit presents different innovative approaches and case studies where stakeholders participate in the development of a tourism destination and product, in terms of building networks, developing concrete actions and implementing new approaches of governance involving different types of players such as, for example, Destination Management Organisations (DMOs), private and public institutions and cultural associations.

MODULE 2 | Design an innovative visitor experience

Module description

This module aims to provide participants with an opportunity to explore the foundations required for understanding visitor experience from a management perspective. Participants will be able to understand the makings of visitor behaviour within a cultural space. This perspective allows practitioners to understand important aspects related to the management of cultural and tourism projects. This study unit provides an opportunity to explore a framework for decoding a strategic direction and identifying short and long- term goals for achieving effective design towards successful visitor experience. Strategy informs those projects necessary for a touristic destination to innovate its product. The need to understand the making of a project is imperative when designing visitor experiences that are unique and different. Design is squarely dependent on a thorough understanding of the audiences, their desires, expectations, needs, etc. Identifying those tools available for cultural heritage managers and applying them effectively form an integral part of this journey. An analysis of visitor habits, behaviours, expectations and desires provide an informed decision-making process, and let us empathise with the visitor in order to find proper ways to connect and engage them.

Educational strategy

- 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

UNIT 2.1 | BASICS OF PROJECT DEVELOPMENT

Description

This unit focuses on the basic knowledge and skills required when developing a project. Participants will start by understanding the nature of a strategic plan and how this information leads projects that seek innovation within the mission, vision and values of the destination. Participants will explore the project life cycle and learn how to build a successful project from pre-implementation to completion. The more one understands the various dynamics that

manifest themselves during projects, the better prepared the project manager is to address challenges and rectify instances of practice that may be improved. The latter includes a thorough understanding of the importance of a visitor-centred experience where outcome is prioritised over output. Against this background, participants will be assisted in understanding how the management of visitor relations informs strategy, helps the members of an organisation understand common goals, informs the vision and mission, and allows for investment and therefore possibilities for projects that earmark innovative design experiences.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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
- **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.

SUB-UNITS

S.U. 2.1.1 – Strategic planning initiatives: mission, vision and objectives of the organisation

This sub-unit provides participants with basic information on the nature of strategic planning in preparation towards designing visitor experiences. Participants are provided with basic understanding about the making of a strategic plan, including insights on how to formulate adequate vision and mission statements.

S.U. 2.1.2 – Designing cultural projects: scope and sequence

Project management should include the following key components: integration, scope, time, cost, quality, procurement, human resources, communication, risk and stakeholders. Bringing a project to closure is considered by many as the most valuable process of the entire journey. Adopting an inward-looking approach, project management teams could learn valuable lessons from first-hand experience, situations that allow for improving the team's strengths while reflecting on how to further improve on any practice learned by facing particular challenges.

S.U. 2.1.3 – Managing cultural projects

This study sub-unit explores the basic tools necessary in managing projects. Participants are also engaged in understanding those basic skills and competencies required when managing projects that include leadership, communication, difficult conversations and similar topics.

UNIT 2.2 | THE AUDIENCE DEVELOPMENT PLAN

Description

This unit provides participants with the necessary knowledge and skills for understanding visitor profiles and behaviours and for responding to their needs, expectations and desires – the basics for setting up a meaningful experience. The relationship between visitor capacity and physical space is a potential influence on the quality of the visitor's experience. Such understanding allows managers to adopt proactive steps to further enhance the retention of current visitors while identifying potential tools that empower the visitor to reach into and engage with the exhibits. A good grasp of the visitor's current engagement with the cultural heritage space also allows for the manager to advise on potential projects that could further attract returning and new visitors to the cultural heritage institution.

The audience development process ensures that cultural heritage destinations maintain a strong focus on delivering a service that works for the audiences – both existing and potential.

Identifying an adequate development plan is a basic requirement that provides the necessary focus and direction of any proposed innovative visitor experience.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 2.2.1 – Audience development: an introduction

Designing and populating an effective audience development plan is important for supporting the business plan or organisational strategy of a cultural heritage destination. In this sub-unit, the participants will explore the different methods employed for reflecting on an organisation's approach, and for assessing that it is effective and up to date. Participants will also explore how short and long-term goals are defined for supporting possibilities to grow or widen the audience with uneven resources.

S.U. 2.2.2 – Mission, vision and audience ambitions to create meaningful and engaging experiences

In this sub-unit, participants will explore basic aspects of the 'audience development plan'. Participants will explore approaches to understanding how audiences are key players in the mission, vision and strategy of an organisation. The latter informs the ambitions or 'goals' for public engagement and audience revenue. The course material supports participants with information for assessing organisational limitations, using evidence to assess situations and audience potential, and to understand audience barriers and needs. As part of strategy, participants cover the main approaches likely to meet aims, capitalise on opportunities and mitigate risks.

S.U. 2.2.3 – Objectives, action and review of designing visitors' experiences

An audience development plan requires clearly defined objectives that follow from the previous study unit. The action plan requires managers and the associated stakeholders to translate such thinking into everyday practice. Action is often defined within a set timeframe with detailed annual key performance indicators (KPIs). During this sub-unit, participants will also explore ways of reviewing and adjusting the action plan regularly as part of a cycle.

UNIT 2.3 | AUDIENCE SEGMENTATION

Description

Cultural heritage institutions can benefit from adopting effective data-collecting practices for better-informed decision-making processes. Data-driven strategy supports cultural heritage practitioners in understanding current visitor behaviour, anticipating the needs of the visitor and designing visitor experiences in a manner that engages and empowers the audience. This study unit presents the various research methodologies.

Audience segmentation involves thinking about audiences as distinct groups. Audience segmentation is ‘the process of splitting customers, or potential customers, within a market into different groups, or segments, within which customers have the same, or similar requirements, satisfied by a distinct marketing mix.’

Data collection is derived from many different sources and it depends on technical knowledge, availability of staff and the needs of the cultural heritage institution. Deciding what type of data to collect is important in informing adequate project planning. When generating a visitor-centred experience, identifying the needs of the same visitor is imperative. Therefore, understanding basic information, such as demographics, geography, behaviour and attitudes, is crucial when designing innovative visitor experiences.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 2.3.1 – Audience segments and personas

This sub-unit will explore the basic principle of understanding and improving relationships with audiences. Participants will explore the latest studies on how different information needs to be provided for the different needs and requirements of the audiences. Understanding the audience requires cultural heritage managers to move away from assumptions and identify effective measures to plan innovative experiences around the audience. This sub-unit provides basic theoretical information about audience segmentation and personas. Participants will also be presented with case studies of audience segmentation as examples of good practice for further reflection.

S.U. 2.3.2 – Primary data for cultural tourism projects

Primary data relies on quantitative and qualitative information which is new and unavailable for the organisation. This information could be collated through surveys, polls, e-surveys or face-to-face interviews. Qualitative research methods, such as ethnography, provide important information otherwise impossible to analyse through quantitative data collection. Individual and collective interviews, informal discussions, observation of visitor behaviour when interacting with the space and the exhibits, provide insightful information complimenting other data-gathering methodologies.

S.U. 2.3.3 – Secondary data for cultural tourism projects

Secondary data, sometimes also referred to as ‘desk research’, is mainly information that already exists. This information could be internal, available within the organisation, such as previous research or ticket sales. There is also external information that could provide important insights such as government surveys or population information.

UNIT 2.4 | ENGAGING THE AUDIENCE

Description

While engaging existing audiences is relatively straight forward, the visitor profile and behaviour of a cultural heritage institution would benefit from any data collated from new audiences. Initiatives to bring forth newcomers to your institution provides a better picture of the motivations of such an audience. The data collated from existing and new audiences provides hard evidence rather than perceptions of what a project should involve.

Adopting an effective marketing mix becomes an important launching platform to attract visitors, both existing and new. In order to reach your target audience and meet the audience objectives, strategies have to be developed in a manner that fulfils every aspect of audience profile and behaviour. Having considered what a cultural heritage institution is offering, promotion, partnerships, place, people and price are the main tools that could be employed to reach the audience, but also to inform the experience design of the heritage site.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 2.4.1 – Engaging existing audiences in cultural heritage sites

Maintaining a regular relationship with audiences is key to ensuring they revisit regularly. This unit presents the necessary background through academic literature and a variety of case studies. Participants will be able to explore ideas of how communication is about building a two-way conversation between an institution and its audiences, picking up on their interests,

responding to enquiries and issues promptly and building on previous interests to showcase relevant news.

S.U. 2.4.2 – Engaging new audiences in cultural heritage sites

Existing audiences should always be your starting point when beginning your audience development. However, in this sub-unit, participants will be provided with various methods of deepening the engagement and encouraging new audiences in order to enhance the understanding of the visitors' experience. New audiences could be engaged through a variety of possibilities that vary from physical presence to remote interaction (such as the use of digital platforms) with the product.

S.U. 2.4.3 – Audience development tools to engage and enhance visitor experience

An understanding of the 'engagement mix' is important as a tool to engage and enhance the visitor's experience. Participants will also explore the four realms of the Experience Model and the THEME Model as part of the experience design. Participants will explore case studies to further understand such processes and how these were applied by various cultural heritage managers.

MODULE 3 | Digital strategies and tools for cultural heritage

Module description

Digitalisation shakes up many aspects of our society, including the cultural heritage sector. But as with many others, this is also a chance for the sector to react to new demands and to innovate. Digital technologies show a variety of possibilities in many aspects of heritage work; apart from preservation and conservation, applications may be found in the digitisation of artefacts, sites or intangible cultural heritage, but also in the ways heritage is turned into engaging experiences for visitors.

This module gives participants an overview of the main digital dimensions of cultural heritage. They will analyse and improve existing digital tools and policies and evaluate what will be useful in their context and learn how to conceptualise and articulate their ideas through different digital media and tools. Furthermore, participants will analyse and evaluate the utilisation of possible digital marketing and communication strategies for promotion, audience engagement and institutional networking and knowledge exchange. To contextualise upcoming and new digital trends with the cultural heritage and tourism sector and formulate strategies on how to integrate them into the organisation's needs. Finally, the learned digital skills will be developed to evaluate when and how to cooperate with external experts to form long-term digital strategies.

Educational strategy

- Video presentations
- 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

UNIT 3.1 | UNDERSTANDING THE POTENTIAL OF DIGITAL DATA IN THE CONTEXT OF CULTURAL HERITAGE

Description

Cultural heritage institutions realise that adopting effective data collection practices to implement better-informed decision-making processes will help develop their visitor

interaction, outreach, educational projects and networking in the short and long term. Data-driven strategy supports cultural heritage practitioners to understand current visitor behaviour, anticipate the needs of the visitor and design visitor experiences in a manner that engages and empowers the audience.

This study unit presents the essential features and practices related to the digital environment, the various methodologies that provide data collection, tools and applications. The relevance of different tools are discussed and presented, taking into account the various organisational needs.

While the first sub-unit offers insight into the basics of the digital world, the other two sub-units look at the essential digital capacities of both the organisation (second sub-unit) and the audience/visitors/consumers (third sub-unit) as a starting point for developing the most appropriate digital strategies for the enhancement of cultural heritage or to design and implement standalone digital products and experiences.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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)

SUB-UNITS

S.U. 3.1.1 – Understanding the digital environment

This sub-unit has an introductory character, and prepares the participants for grasping the specificities of the digital world. The basic structure and the main instruments of the digital realm are explained, from the perspective of their potential use in the cultural heritage sector.

The participants in the training will get familiar with central digital notions such as databases, hosting, cloud services and the basics of digital interfaces and interactions between humans and computers. Further on, participants will understand various data collection practices by

looking at the principles of data collection, the usage and protection of datasets, and the identification of extra values of collected data. Special attention is given to the legal and ethical aspects that govern digital data use, from copyright and data re-use issues to legal aspects of privacy, technological restrictions, and notions of the social impact of relevant digital applications.

S.U. 3.1.2 – Recognise, evaluate and train digital skills within the organisation

This sub-unit gives participants useful guidance to research, understand and assess the digital capacities within their own organisation as a prerequisite for developing and expanding feasible digital strategies. The unit delivers key points for exploring the present digital status of the organisation and for identifying the actual needs for acquisition of new digital skills, in connection with the potential for digital enhancement of specific cultural heritage objectives/expressions, while keeping in mind aspects related to education, cultural mediation, public relations and marketing.

S.U. 3.1.3 – Digital exchange with visitors

Upon completion of the first unit, this sub-unit approaches the evaluation of visitors and consumers in terms of digital exchange with the cultural heritage organisation. Charting the digital skills and needs of visitors, identifying the opportunities and benefits of exchanging data through digital means for both the organisation and the visitors, is contributing in an essential way to the development of efficient digital strategies that maximise the enhancement of cultural heritage. The participants in the course will discover ways to direct the research efforts of their organisation in order to meet the expectations of a larger audience and to attain a higher visitor and consumer reach through digital channels and adapted digital products.

UNIT 3.2 | NEW DIGITAL STRATEGIES AND TOOLS FOR EXPERIENCE-BASED CULTURAL HERITAGE SITES

Description

The digital world progresses continuously, and technological developments and innovations also enable new potential use in the process of the experiential enhancement and mediation of cultural heritage. The unit presents the current developments and trends in the digital field such as augmented and virtual reality, 3D technologies, gamification and projection mapping, and introduces their main characteristics and applications. To deepen understanding and learn how to conceptually develop digital strategies, case studies will be given in relation to cultural

heritage. This overview and analysis lays the foundation for learning how to develop individual context-specific digital strategies.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 3.2.1 – Recent and future trends in the digital field

This sub-unit gives an overview of existing and near-future technologies and explains the basic technical functionalities. Common technical applications and terms will be introduced, and the potential and limitations of certain technologies will be discussed: mixed reality (augmented and virtual reality and surrounding technologies), 3D technologies (Overview of Polygon, parametric and voxel-based approaches, application in 3D scanning and 3D printing), gamification (for online and offline usages) and mediatised surfaces (through projection mapping, screen-based interactions, etc). For each topic, the characteristics of the necessary internal and external technical resources are also discussed.

S.U. 3.2.2 – Best practices and case studies

Building on the previous sub-unit, different case studies and best practices from the fields of public interfaces, artistic visions and cultural heritage exhibitions will be discussed, and different resources, networks and conferences for inspiration will be presented. Based on this, the criteria for successful experience-based approaches is defined. Analysing the expected technical, financial and human resources of the examples will help to understand the requirements when looking at how to transfer aspects of the best practices into individual projects.

S.U. 3.2.3 – Developing digital strategies

This sub-unit aims to define the goals for the digital development and extension of the organisation.

After showing different ways to map and analyse the current status of an organisation, potentials for improvement are defined based on the previous inspirations and context analysis. To formulate a strategy with clearly defined steps, ways to embed the digital strategy into general strategies of the organisation are also reviewed. Finally, the necessary elements, resources and knowledge for a successful implementation are developed and planned.

UNIT 3.3 | DIGITAL MARKETING AND COMMUNICATION FOR CULTURAL HERITAGE

Description

The unit introduces an inventory of digital marketing instruments, such as digital branding, websites, SEO/SEM, social media presence, e-newsletter, mobile web, phone applications, online gamification and blogging. Hands-on examples show their use as part of the communication strategy for a cultural heritage context. The unit also covers the development of key hybrid communication strategies that combine digital and analogue elements. Participants will learn how to foster the creation of digital networks that can be exchanged with other sites/destinations in similar situations, and how to use digital networks for fundraising, policymaking and other purposes.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 3.3.1 – Digital marketing strategies

This sub-unit comprises the foundations for digital marketing strategies in cultural heritage contexts. Bringing up tools and theories from marketing studies (branding, positioning, competence, etc.), the participants explore the fundamental elements of digital marketing. By means of the characterisation of the main digital channels for cultural heritage promotion, the participants undertake to learn how to use existing tools to improve development, management or communication online. Furthermore, this sub-unit develops the ability to learn about the practical implementation of digital marketing strategies (steps and resources) by analysing case studies and best practices.

S.U. 3.3.2 – Blogging and using social media in the digital scenarios of the experience

The sub-unit deepens the knowledge and use of digitally mediated communication and enhancement techniques for a cultural heritage site, focusing on brand-building and blogging and social media as efficient marketing techniques. The sub-unit explores alternative types of online participatory projects and their potential for audience development that could significantly contribute to raising the profile of cultural heritage destinations.

S.U. 3.3.3 – User engagement and storytelling

In this sub-unit, the storytelling concept is established as a key competence of e-marketing which facilitates the participants in learning about how to build up and maintain virtual and analogue communities for cultural heritage sites. Moreover, participants will learn the measurement and understanding of storytelling-specific objectives using, for instance, tools such as Google Analytics.

UNIT 3.4 | DESIGNING ONSITE AND ONLINE DIGITAL EXPERIENCES FOR VISITORS

Description

Relying on the knowledge and skills previously accumulated, the unit provides context and possible approaches for identifying the potential for the digital and experiential promotion of a specific cultural heritage objective, using the characterisation, audience analysis and project management (design and planning) of cultural heritage.

Progressing from the theoretical approach of previous units, this unit offers insight on current best practices and examples of enhancement, and uses them as starting points for designing new digital experiences for visitors both onsite and online. Looking analytically and critically at the landscape of digital projects focused on or derived from cultural heritage, participants gain insight into the best possible approach to site-specific projects, avoiding mistakes that lead to both unsuccessful experiences for visitors and wrongful promotion of cultural heritage values.

Therefore, the reviewing of case studies will focus not only the digital performance and novelty of the experience, but also on its adequacy and efficiency in communicating the value of the cultural heritage to a specific target group.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 3.4.1 – The digital experience in the Experience Cycle

Building on the knowledge and skills acquired in previous modules, this sub-unit enables the participants to assess the potential for the digital enhancement and interpretation of a specific cultural heritage site as part of the Experience Cycle that could be online or onsite. Best practices and examples of the experiential enhancement of cultural heritage in the digital realm will be analysed and discussed against different criteria: cultural adequacy, educational potential, creativity, contribution to innovation in the field, digital performance, user (public/visitor/tourist) adaptability, costs, etc.

S.U. 3.4.2 – Designing the digital experience: processes and steps for online and onsite initiatives

As part of the enhancement of cultural heritage for both educational and entertainment purposes, this sub-unit deals with the design and planning of the implementation of specific digital experiences, adjusted to the visitors' profiles. The participants will learn the creative process inspired by cultural heritage objectives/expressions, assimilating modalities to identify their potential in terms of digital enhancement and promotion. While attempting to design the digital experience, the participants will consider elements of project management and will learn the ways to anchor the digital product into the general marketing strategy.

S.U. 3.4.3 – Implementation of the digital experience and approaches for evaluation

The last sub-unit of the module deals with key aspects related to the actual implementation of the digital experiences as well as with setting up relevant approaches for the evaluation of the experience. This includes identifying suitable performance indicators adapted to the designed experience, in correlation with the objectives established in the digital strategies. The participants will learn the importance of making a distinction between digital performance and digital engagement. The evaluation of a designed digital experience will correlate an entire array of performance indicators, uniquely developed for the specific digital interpretation of the cultural heritage objective/expression.

MODULE 4 | Entrepreneurial approach for cultural heritage

Module description

This module will approach the concept of entrepreneurship, a transversal competence that is recognised as being necessary for every professional working in a transmutable environment. Questions will be addressed as to what is entrepreneurship, how it translates into practice, and why it is relevant to cultural heritage professionals. Based on the Entrepreneurial Competence Framework, which aims to provide a unified view of the concept in Europe, being entrepreneurial goes beyond setting up a business, and is shown as a mindset supporting individuals in the workplace as much as in their everyday lives, at home and in society. This module will present entrepreneurial strategies that are fundamental for the commercial and financial development of the cultural heritage sector, as well as management methodologies that promote valuable skills.

Educational strategy

- 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

UNIT 4.1 | ENTREPRENEURIAL SKILLS AS KEY ELEMENTS FOR A NEW MANAGEMENT OF CULTURAL HERITAGE

Description

The overall scope of this unit is to familiarise learners with the concept and the sense of initiative and entrepreneurship for cultural heritage professionals, which is built on a broad definition of entrepreneurship as a transversal key competence. Entrepreneurial competencies for cultural heritage professionals can create social, cultural or economic value. In more detail, the unit will cover the following topics:

- What is ‘sense of initiative and entrepreneurship’?
- What is the added value for cultural heritage professionals?

Learning Outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 4.1.1. – Enhancing entrepreneurial competencies within EntreComp

Based on the European Entrepreneurship Competence Framework (EntreComp), the learner will have the opportunity to learn the necessary abilities and competencies for a competent, creative and innovative professional. In this sub-unit, the three competence areas are presented that directly mirror the definition of entrepreneurship as the ability to turn ideas into action that generate value for someone other than oneself, and the fifteen competencies that, together, make up the building blocks of entrepreneurship as a competency for all professionals.

S.U. 4.1.2 – Recognise, evaluate and train entrepreneurial skills with EntreComp

This sub-unit introduces the learner to the concept of entrepreneurship, understood in principle as a hybrid form of creative professional activity, combining digital and entrepreneurial competencies. The focus will be on the ways that a cultural heritage professional has to think in order to cope with changes, develop strategy and manage potential risks. At the end, the focus is on how EntreComp can be adapted in the sector, including cultural heritage institutions as nonprofit organisations.

S.U. 4.1.3. – The role of public policies in developing the entrepreneurial and innovation potential of the cultural and creative sectors

The innovative power of the cultural and creative sectors is essential for the further development of European economies and societies, because it: generates well-being and cohesion; shapes the public space used by millions of Europeans; modernises industries and business sectors with new creative input and methods; provides meaning and a feeling of belonging; upgrades urban and rural areas; designs our products and services; produces and digitalises content; enriches our visual experiences, and provides content for debates.

UNIT 4.2 | CULTURAL ENTREPRENEURSHIP – WHAT IS IT?

Description

In this unit, the learner will be introduced to the concept of cultural entrepreneurship as well as the role and the essential competencies needed for the role of the cultural entrepreneur. Entrepreneurship represents one key element which contributes to the sustainable development of the creative industries.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 4.2.1. – The essential competencies for the cultural entrepreneur

Nowadays, the entrepreneurship capacity determines the competitiveness of an organisation. Therefore, entrepreneurs are considered a vital resource. The objective of this subunit is to establish what the key individual competencies are for cultural entrepreneurs. Skilled cultural action is crucial for entrepreneurs in order to attract resources to develop and grow their new organisation.

S.U. 4.2.2. – Theoretical model: How entrepreneurs develop social & cultural competencies

Social entrepreneurs play a key role in society having transformed the business model in the cultural heritage sector. The sub-unit attempts to respond to crucial questions such as, what characterises the social entrepreneurs, what are the primary social responsibilities, and what are the tools they can use to address specific issues? Also, the sub-unit presents the theoretical model developed by Überbacher et al. (2015) on how entrepreneurs develop cultural competencies in the market domains where they situate their new organisations.

S.U. 4.2.3. – The entrepreneurial ecosystem of cultural and creative industries

A strong ecosystem will create a dynamic interplay between different parts of the creative industries and with the broader economy. It will support organisations in being innovative and will ensure a continual pipeline of activity to create jobs, infrastructure, cultural vibrancy and growth. The case of the European Capital of Culture initiative evolved from a traditional arts festival into a complex programme tied to economic and social objectives.

UNIT 4.3 | FINANCIAL MANAGEMENT OF THE CULTURAL HERITAGE AND TOURISM SECTOR

Description

This unit will approach one of the underpinning elements of entrepreneurship and of the cultural heritage and tourism sector. The capacity for financial management is represented in entrepreneurship and in the EntreComp framework as a key competence for generating profit and creating a viable enterprise. In a context of economic challenge, financial sustainability is of utmost importance in the, at times fragile, cultural heritage and tourism sector. By taking a closer look at the economic context of the cultural heritage and tourism sector, this unit will raise the questions of which instruments are used to find financial stability, and how entrepreneurial skills are an asset in the management of funds.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 4.3.1 – Analysing the financial context and defining a sustainable financial plan in cultural and tourism management

Financial management is recognised as an essential competence for entrepreneurs, that is, for businesses, NGOs, and private or public institutions. Financial sustainability is often considered a challenge in the cultural and tourism sectors, as they are often heavily impacted by the global economic state. Therefore, it is critical to integrate entrepreneurial reflections into cultural and tourism management. This sub-unit will analyse the financial context of the cultural heritage and tourism sector while introducing the participants to the current funding sources available. Once familiar with the context, the participants will be given key elements regarding the elaboration of a sustainable financial plan, as well as methodologies for implementing the plan and monitoring the results.

S.U. 4.3.2 – Implementing a fundraising strategy in the cultural heritage and tourism sector

Fundraising is a method of collecting funds that is used in a variety of sectors. Usually associated with a financial strategy choice for the nonprofit organisations, fundraising has become a popular and vital tool to bring support to the cultural heritage sector as well. In this sub-unit, the participants will take a look at common fundraising beliefs and practices. They will be introduced to the fundraising context that is influenced by the contemporary political and economic landscape. They will approach different fundraising methodologies and analyse the fundraising process. They will be given examples of fundraising strategies through case studies, from those concerned with identifying donors to campaigning.

S.U. 4.3.3 – The different financial models and organisational structures for cultural heritage and tourism

The financial model is a paramount aspect of an organisation's business model. This sub-unit will provide a detailed explanation of what constitutes a financial model, which can differ depending on the organisation's structure. The sub-unit will highlight the different typologies and financing systems related to the public, private, and non-governmental sectors. The participants will develop a critical sense of the key entrepreneurial competencies that are implemented in the establishment of a financial plan, and will be presented with case studies in the cultural heritage and tourism sector that will illustrate the different kinds of financial models and organisational structures that can be found in the sector.

UNIT 4.4 | ENTREPRENEURIAL STRATEGIES FOR INNOVATIVE CULTURAL HERITAGE AND TOURISM MANAGEMENT

Description

If the economic stability of an organisation is crucial, it is only one aspect of its sustainability. Indeed, to be successful, an organisation needs a long-term and complete entrepreneurial strategy. Stepping away from the financial focus, this unit will look at other aspects of the most important components for an organisation's viability. These include marketing and communication strategies, product and experience development, and management methodologies. In the face of the multiple challenges the cultural heritage and tourism sector is facing, it is necessary for those organisations to implement innovative strategies with an entrepreneurial approach, by taking into consideration their cultural aspect as well as their desired business outcome.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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
- **LOut6** Recognise the emergence of social entrepreneurship and its influence on the cultural heritage and tourism sector
- **LOut7** Assess new management tendencies.

SUB-UNITS

S.U. 4.4.1 – New sustainable business models for valuable experiences in the cultural heritage and tourism sector

As an entrepreneur, developing a strong business model is the first step to the creation of an organisation. In this sub-unit, the participants will be presented with the different key points of a sustainable business model. They will measure the significance of having a marketing strategy in order to not only promote their products and attract customers, but also to understand how to adapt to the customer's evolving needs and interests. With new challenges

brought by an ever growing digitalisation and, more recently, by the COVID-19 pandemic, the cultural heritage and tourism sector is in need more than ever of implementing business strategies that contribute to its development while preserving its cultural and experience-based aspect.

[S.U. 4.4.2 – The ‘lean management’ methodology in cultural heritage and tourism](#)

In an attempt to approach successful management methodologies, this sub-unit will introduce lean management and its value in the cultural heritage sector. The heritage and tourism sectors need to evolve their services to meet the ever-changing needs of their beneficiaries, both tourists and local communities alike. This requires a lean approach, thanks to skills related to knowledge integration. A museum, a tourism enterprise, and any private, public or third sector organisation, is a complex ecosystem, which needs to improve organisational efficiency and to generate impacts on the local community. This is the reason the holistic approach of lean management is needed, to make the activities and strategies of organisations working in the heritage and tourism sectors more sustainable.

[S.U. 4.4.3 – A new holistic approach in cultural heritage and tourism management](#)

Compiling the different entrepreneurial elements mentioned throughout the module, this sub-unit invites the participants to reflect on innovative approaches in the cultural heritage and tourism sector. As a strong sense for social responsibility has emerged, along with the need for business models to follow a knowledge integration process, more and more organisations are reshaping their entrepreneurial strategies. These new tendencies will be illustrated through case studies that will approach new holistic management methods, such as destination governance and the involvement of stakeholders in the administration of cultural heritage and tourism experiences.

MODULE 5 | Sustainability, impact measurement and project evaluation

Module description

Module 5 promotes the growing perspective necessary to create a culture of measurement from within the institutions responsible for the management of cultural heritage: on one side, to be in alliance with the global vision of sustainability and for a better understanding of cultural value, and on the other side, to enable evidence-based professional development for the improvement and monitoring of objectives and mission.

This module focuses on developing professional skills to capture and interpret the generation of evidence, design the process needed to create a culture of measurement, and to develop an evaluation project. A further goal is to support institutions in the measurement, processing and communication of non-financial information, and how to make good practices visible.

Educational strategy

- 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

UNIT 5.1 | CONCEPTS AROUND SUSTAINABILITY AND IMPACT MEASUREMENT

Description

The goal of this unit is the commitment to training professionals to expand the strategic vision that sustainability represents, developing a culture of measurement in organisations, which implies joining the international discourse on value-based performance, and also to respond to the recommendation in the management of cultural heritage conventions to 'include appropriate monitoring and evaluation methods', and a commitment toward social impact measurement.

This unit provides a context for the new professional paradigm from different perspectives and sectors towards understanding the international vision, and through describing and clarifying the concepts, needs and purposes, as well as the main actors and drivers.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 5.1.1 – The debate on sustainability in culture as a strategic vision

The goal of this sub-unit is to understand the debate on sustainability in the global community as a facet of a value-based performance and accountability, and the relationship and interaction with the cultural sector and the different approaches to the contribution of culture towards sustainable development. The starting point will be the work of UNESCO, taken as a general overview on the international debate on sustainable development.

S.U. 5.1.2 – Why measurement matters: steps beyond monitoring and evaluation

A first approach to evaluation is about understanding the process of creating a culture of measurement and evaluation. It is about facing the challenge of the journey towards incorporating measurement processes in performance in a sustained and useful direction. It implies a commitment to performance excellence.

S.U. 5.1.3 – Social value and glossary of concepts

This second approach concerns the social value debate: what it is, according to the glossary of concepts, and the opportunities and challenges that are taking place in this debate in the cultural sector.

UNIT 5.2 | EVALUATION APPROACHES IN CULTURE AND TOURISM

Description

This module will develop the necessary skills for planning and designing a measurement project, understanding what the concepts and principles are, transmitting the importance for culture, identifying the barriers, understanding the insights in the international framework and the specific characteristics within the sector. Upon completion, the participant will be aware of the processes, methodologies and the fundamental existing tools, and be able to apply them according to the different approaches in each case. The goal is the achievement, at the end of the journey, of a pilot model for a proposed real case study.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 5.2.1 – Multidimensional and multi-value approaches

The first sub-unit deals with how to integrate the strategic vision of sustainability in the cultural and tourism sector and how to analyse the European Union's two-way action in terms of cultural policies and strategies and their practical implementation through programme funding.

S.U. 5.2.2 – Challenges and opportunities for measuring culture

Once the complexity and entry barriers to an evaluation project have been analysed, it is necessary to consider opportunities in relation to many areas of performance that arise, such as the relationship with stakeholders, transparency, the generation of evidence for continuous improvement, accountability, value creation in storytelling, and marketing.

S.U. 5.2.3 – Design a process for planning an evaluation project

In this sub-unit, participants will learn how to design the process needed to develop an evaluation project, define the stakeholders, plan the purpose and scope, and define the steps needed to achieve the knowledge and skills for planning and implementing a measurement programme.

UNIT 5.3 | HOW TO DO IT: IMPACT MEASUREMENT PROJECT FOR THE EXPERIENCE

Description

Developing a measurement project starts with a process, from understanding the state-of-the-art methods of performance through evidence, to setting objectives through the design of a process or mind map for achieving implementation in the strategy and operations of the institution or programme.

Furthermore, measurement is a cyclical tool, which is refined through iteration. Knowledge of key terms and their correct application is fundamental to the achievement of measurement.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 5.3.1 – Impact measurement cycle

The objective of this sub-unit is to transmit the knowledge for designing a tool (measurement cycle) based on existing methodologies, a tool that can be integrated into the strategic vision of cultural heritage professionals in their respective realities.

S.U. 5.3.2 – Which kind of data it is important to evaluate: output, outcome or impact

Once the framework is settled, a pragmatic perspective on how to measure the social effect of cultural heritage will be explored, through a general view of methodologies and tools for generating evidence, such as quantitative and qualitative methods, theory of change as strategic thinking, and systems of possible indicators (the Culture 2030 project) already developed in the cultural sector.

S.U. 5.3.3 – Managing impact and evaluation: building a tailored model

The planning of a measurement model will be developed depending on the needs of the institution or according to whether the project will be included in the measurement programme, for which the most appropriate tools for the case will be selected.

UNIT 5.4 | APPROACHES AND METHODOLOGIES: SUSTAINABILITY AND SOCIAL IMPACT MEASUREMENT IN CULTURAL ORGANISATIONS

Description

Measuring social impact is a priority for social organisations and investors. Depending on the institution and its resources, the impact measurement process will be more or less in-depth. The fundamental step when approaching impact measurement is carrying out an initial diagnosis to capture the state of the art of the institution, its strategies and lines of action. The analysis of existing data will lead to conclusions that can initiate a measurement cycle. For each of the case studies, a measurement project will be developed that adds value by focusing on areas such as SDGs, programme monitoring or the triple bottom line.

Learning outcomes

After the completion of this unit, the learner will be able to:

- **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.

SUB-UNITS

S.U. 5.4.1 – Measuring sustainability: alignment with SDGs

An action aligned with the SDGs requires a more innovative and ad-hoc methodology depending on the programme and objectives to be evaluated. These organisations will need an impact assessment from other parameters and guidelines in the process.

S.U. 5.4.2 – Intervention logic and SMART indicators

The institutions that have these programmes are those that have an approach that not only takes into account the environmental, but also the social and economic aspects. From here, with these objectives, we will work to generate different dynamics for measuring impact.

S.U. 5.4.3 – Monitoring and evaluation methodologies

Agile methodologies allow us to adapt the way of working to the conditions of the project to be measured. These will be developed in a flexible and adaptable way to the needs of the institution, allowing a better evaluation and monitoring of programmes.



Co-funded by the
Erasmus+ Programme
of the European Union

EU Heritage.

Skills for promotion,
valorisation, exploitation, mediation and
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