PR3A1: Draft Methodology

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Consortium

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

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

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This deliverable contains original unpublished work except where clearly indicated otherwise.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

Disclaimer:

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List of Abbreviations

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

Abbreviations	Description
OI	**Open Innovation**
OIP	**Open Innovation Project**
OII	**Open Innovation Initiatives**
CHOs	**Cultural Heritage Organisations**
HEIs	**Higher Education Institutions**
PR	**Project Result**
MMG	**Mapping & Matching Guide**

Executive Summary

This Methodology has been created to enable the effective replicability of Open Innovation Project (OIP) initiatives driven by Higher Education Institutes (HEIs) for the benefit of Cultural Heritage Organisations (CHOs). The need for a Methodology stems from a lack of systematic knowledge on how HEIs can benefit from Open Innovation (OI) tools to address challenges of CHOs.

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

The Methodology contains examples and guidelines to serve the 3rd Project Result (PR3) implementations at different stages. Once these are completed, the Methodology will be revised and finalised so that it is easily replicable for the benefit of other academia-society cooperation using OI for a social purpose.

PR3 also aims to pilot and implement the Methodology with a CHO per country before scaling it up in 4th Project Result (PR4), with the production of a report titled "Lessons Learned and Recommendations to HEIs". Each cultural organisation will define an action plan containing the criteria and the modalities that define the Methodology and they will showcase it during an online event.

The expected impact is a strengthened collaboration between HEIs and CHOs using Open Innovation Initiatives (OII) that are easy to adopt and replicate for the benefit of the European cultural and creative sector.

1 Introduction

The eCHOing project works towards the recovery of the Cultural sector, which has been most severely hit lately by different crises, specifically small and medium–sized CHOs. Recovery of the cultural sector after a crisis can be addressed through various measures, such as financial aid for cultural institutions and artists, promotion of cultural tourism, and the adoption of new technologies and digital platforms to reach wider audiences. eCHOing project focuses on creating collaborative and innovative projects through OI collaborations, that bring together different sectors of society and can help revitalise the cultural sector and its impact in the long term.

The eCHOing project sees OI as a collaborative effort between academia, the cultural heritage sector, and members of the public, with the aim of creating an open space of exchange of knowledge and innovation.

The project began in January 2022, with its first Project Result (PR) being a desktop survey, conducted by the eCHOing consortium in 5 countries in order to gather the 60 best international and European practices of such collaborations (PR1A1). The analysis of the data based on certain criteria (see PR1A1) gave an overview of actions needed to be established in order to facilitate a transfer of knowledge on OI collaborations between universities and museums. eCHOing partners thus followed a framework related to a practice – oriented approach explained in a five point summary:

1. Develop a process and methodological framework to guide OII between HEIs and CHOs.

2. Register best practices in OI projects in the cultural sector and create a shared understanding of stakeholders' roles and benefits.

3. Share best practice approaches to data sharing and highlight the potential impact OII can have on the cultural heritage sector.

4. Establish a network of HEIs and CHOs that formalises their roles as partners in joining the consortium and enabling greater collaboration.

5. Promote open data initiatives between the educational and heritage sector, through open access webinars and meetings .

The eCHOing Project released a report in October 2022, called, [PR1A5: Practices in the Revival of European Cultural Organisations Through University-Driven Open Innovation](#), where it showcased best practices of Higher Education engagement in the revival of CHOs through OI on a regional, national and European level. Different barriers and obstacles were identified, and the difficulty in comprehending the usefulness and impact of OI was amongst them. Funding and access to resources were also an obstacle for many CHOs. The language issue in defining the term of OI and its practices, like hackathons and hacktivism, needed to be addressed in order to actively create an understanding on the use of these types of activities among the eCHOIng Associated Partners.

Thus, the eCHOing project created a methodology and several other tools, presented here in order to promote small CHOs through OI collaborations with academia. In order to proceed to successful OI collaborations for its stakeholders, eCHOing has also created a piloting methodology (PR3A2) of factors summarised below, that will be analysed further. As outlined in the eCHOing report, the consortium has considered the following steps as important factors in order to establish, first an understanding of the concepts used by the project, and then to facilitate a two-way communication (dialogue) among the partners:

1. Examine the factors holding back CHOs because of their diverse backgrounds (size of the institute, funding opportunities and available financial resources, number of volunteers etc) in order to determine the Methodology of HEI-CHO collaboration and the Action Plans for the OIPs.
2. Identify the organisation-specific, country-specific and region-specific data. By focusing on these the adaptation of relevant methodologies and strategies for HEIs and CHOs' cooperation for OIP implementation.
3. Define ways CHOs can leverage OI more effectively with local businesses and small government departments/NGOs (see [PR1A7](#), pg.12).

The collection of the above mentioned data will ensure that all partners in this third stage called PR3 will participate and co-produce a methodology of OI project-implementation for the benefit of CHOs. This methodology will be then used to establish a successful implementation plan, by using 5 pilots through selected collaborating APs in 5 countries.   Finally, PR3 will evaluate the success of the implementation of the pilot projects and proceed to assess the impact of the projects through SWOT performance analysis on the extent of its success. The final Methodology will thus be adjusted according to the findings, and released in order to

enable the effective replicability of OIP initiatives driven by HEIs for the benefit of CHOs.

2 Tools Developed by eCHOing

eCHOing has identified the need for such a Methodology due to the lack of systematic knowledge on how HEIs and CHOs collaboration can benefit from OI tools to address specific sectoral challenges.

Three tools were developed by eCHOing to familiarise its partners and APs on how OI can be used:

1. Free online modules to establish a common training platform.
2. A Mapping & Matching Guide to explain OI and present several concrete examples of similar projects.
3. An Interview Guide to facilitate the dialogue between partners

These are used towards all target groups of the eCHOing project: primarily staff of all levels and students of HEIs as main beneficiaries and also stakeholders in the cultural and creative sector and small and medium-sized CHOs.

2.1. Online Modules & Learning Objectives of OI Training

Module 1: Open innovation in academia–society cooperation: examples of cultural heritage preservation in a crisis situation

Module 2: Datafication of Collections: Opportunities for Innovation in the novel European Data Space for Cultural Heritage

Module 3: Development of an Open Innovation approach through the co-creation of Immersive Virtual Heritage applications

Module 4: Craft as an empowering tool for community and cultural heritage

Module 5: Diversity, Inclusivity and the Gender Perspective: Women and Cultural Heritage, a how-to crash course

Module 6: Co-designing projects for the cultural sector. Discover the important processes, tools, and skills needed

The target groups for the project are staff at all levels and students of HEIs as well as stakeholders in the cultural and creative sector and cultural organisations.

The aims of the training modules are to:

- Identify opportunities for collaboration between HEIs and CHOs that can expand access to lab facilities and other resources for OI.
- Formulate strategies for local sustainable development through collaborative OIPs for social benefit.
- Identify best practices to encourage civic engagement and intergenerational participation in cultural heritage through OI.
- Identify skills and resources for digital transformation based on informative case studies.
- Apply strategies related to cultural heritage and address broader social challenges through collaborative work.
- Apply co-creative strategies to appeal to broader audiences and make their work relevant to them.
- Use examples of teaching and learning practices that can be tailored to their own organisations as part of flexible educational models.

These modules are designed to train CHO staff as well as Higher Education staff and students to use OI methods and practices. The modules range from basic to advanced topics and are designed to inspire and equip CHOs with the tools and resources needed to effectively conceive, develop, and manage OI collaborations. Through internal and external reviews the six online modules were finalised and run in four different university courses during the spring semester of 2023. Evaluation feedback was also collected from 20 students at the piloting stage of the modules.

The modules were embedded in 4 different courses where 120 students were trained and the main outcomes of the modules are summarised here:

1. An online library was established containing scholarly articles, videos, and other media content related to OI and academia–society cooperations to be used as resources.

2. Engaging interactive modules were designed and delivered, featuring case studies and lessons learned, highlighting innovative ways in which such crises have been addressed by other HEIs and CHOs.

3. Some of the tools used to facilitate collaboration between HEIs and CHOs and to promote OI comprehension were virtual events (E1 and E2), as well as student visits where museum staff were interviewed.

4. OIP ideas were collected from the courses and delivered to the CHOs participating as collaborators for review and evaluation. This was to decide on the final OII to be implemented by the PR4 phase and evaluated by the 5th Project Result (PR5) phase of the eCHOing project in 2023 and 2024.

2.2. Mapping & Matching Guide (MMG)

In addition to the free online learning sessions that have been run by the four partner universities of eCHOing , several other tools have been developed to help small cultural organisations without any revenue to establish an understanding of OI as a tool for collaboration, for their own benefit and in collaboration with students. Additionally, eCHOing has created an OI Mapping and Matching Guide in order to explain the types of OI that could be used during the developmental phase of project collaborations

The eCHOing MMG summarises key forms of OI and provides the CHO partners with an overview of the characteristics of different forms of OI as well as some inspirational examples. It also allows an appropriate matching with associated partners, depending on the size, scope, selected audience etc. of the institutions.
The guide outlines several categories of OI and gives descriptions of practical examples and case studies to provide the reader with a better understanding of the characteristics of each category. Additionally, the guide provides an analysis of the best OI practices and how they were used to create synergies between universities and the cultural sector. The guide furthers the understanding of how OI processes can be implemented in different contexts, considering the specific needs and strategies of the stakeholders involved.

Using the MMG as a foundation for further interaction, partners can identify at a glance the possible type of OI in which they are interested in.

2.3. Establishing a dialogue with the APs: The Interview Guide

Research on the COVID-19 pandemic benefits more from using qualitative studies. It can help ensure that complex psychological, cultural and social factors affected by lockdowns, isolation and uncertainty, can be mapped in a more meaningful way than through bar charts (Tjora, 2019). The need for a more engaging connection to the stakeholders makes the interviews ideal for this type of data collection. The CHOs benefit from a more direct approach on the questions regarding OI. The term itself needs clarification in order to be incorporated into a useful addition to the curriculum. Some of the statements regarding OI are that it opens up for new questions and that it is hard to identify the differences between OI and the work already done by the CHOs. Several of the interviewees called the term abstract. This is why audience engagement and communication is vital when establishing a new understanding between HEIs and CHOs regarding a term like OI. Through the interview process these statements can be followed up and answered in a clearer way than through a survey alone.

In order to facilitate the prospective co-creation of projects with the APs, eCHOing established early a dialogue with selected partners in order to gather additional information and establish a model of two ways communication. This communication has been strengthened through the use of a semi-structured interview guide applied by all partners to collect information from several selected associated partners, that is, small and medium museums.
Generally, the use of a semi-structured interview guide has been applied in order to address the different needs and wishes of the APs.

2.4 Policy framework as a tool for collaborations

The following Policy framework is proposed by all partners to be communicated to stakeholders (CHOs) through OI contracts signed by the collaborators during the PR4 implementation period.

During this implementation period the proposed eCHOing action Methodology will be adjusted to the specific environment and needs of each CHO that implements and

evaluates the proposed project. They will host a HEI student at their premises and work closely with them, following the guidelines outlined in the collaboration objectives below.

The main collaboration objectives are:

1. **Establish objectives**: Identify stakeholders and define project objectives, outcomes, and timelines. Identify the purpose of the collaboration and the competencies each partner brings to the project.

2. **Develop a strategic plan**: Outline the objectives in detail, create a project timeline, develop a plan to coordinate partners, and include plans for resources.

3. **Identify legal issues**: Establish the legal framework, and identify any laws or regulations that need to be followed.

4. **Identify resources:** Secure available resources, staff, technology and partnerships.

5. **Design methodologies**: Design innovative processes to enhance learning, gather data and share information between both organisations.

6. **Develop an implementation plan**: Break down the project into manageable checklists with a timeline; identify any risks and challenges.

7. **Monitor and evaluate:** Create a quality control process to ensure project goals are met; review and evaluate processes regularly.

8. **Create a communication plan**: Create a plan for communication between partners and stakeholders for the duration of the project.

9. **Disseminate results**: Promote the project results (PRs) and outcomes to tell relevant audiences about OI initiatives.

10. **Replicate and scale up possibilities:** Develop plans to replicate successful OI projects and scale up initiatives in the future.

3 The 5-Stage Organisation of an OI Project

The 5-stage structure aims to provide a proposed action plan for the initiation, and implementation of a project collaboration framework. It consists of the following phases:
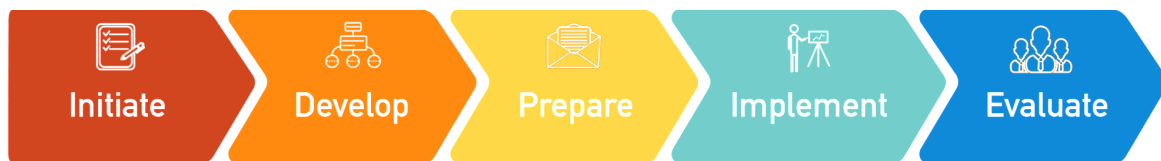

Image 1

1. INITIATE – A strategic alliance between a university and a CHO to explore the OI design models suited to the needs of the partners and to promoting their goals.

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

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

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

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

3.1. A 10-step implementation general guide for Open Innovation Initiatives (OII)

The implementation guide for OI and the action plan for project collaborations between HEIs and CHOs using the Echoing collaboration framework on OII is summarised here in 11 action steps:

INITIATE

1. Establish a group composed of the collaborating partners and map the competencies they bring to the process allowing interdisciplinary and intercultural approaches.
2. Set shared objectives: define a clear set of common objectives and establish a mutual understanding of the aims and objectives of the collaboration.
3. Research: understand previous and existing OI-project collaborations, and identify a target type through eCHOing MMG.

DEVELOP

4. Develop a project plan and timeplan: decide on an approach and create an action plan to implement your OIP, share resources and create content.
5. Agree on the target groups of the proposed project and on methods of engagement for the target groups.
6. Establish communication channels and marketing strategies to interact effectively with target audiences.

PREPARE

7. Establish desired outcomes and produce solutions that are implemented in a way that yields tangible results, for the effective replicability of OI driven by HEIs for the benefit of CHOs for whom the solutions are tailored.

IMPLEMENT

8. Agree on criteria for successful implementation and methods of evaluation.
9. Monitor progress: monitor the project, establish a timeplan and make adjustments as necessary.

EVALUATE

10. Measure impact: evaluate results through surveys, interviews and participatory webinars or workshops with stakeholders based on the established criteria and determine how to move forward and establish further implementation.
11. Establish a systematic evaluation suite to assess the success of the collaboration. This could involve setting specific metrics that parties can use in order to measure the achievements of the collaboration.

3.2. Implementation Examples

A. How a Hackathon Can Be Organised for the Benefit of Cultural Institutions.

A hackathon is an intense, collaborative event in which participants respond to a challenge from an institution – typically a cultural organisation – by developing a solution in a competition format. Hackathons can be great opportunities for small cultural institutions to gain innovative, effective, and cost-effective solutions to their problems. For instance, the "The Future Museum challenge" hackathon series has been organised in several cities, with the objective of creating digital solutions for challenges that museums face.

In order to successfully organise a hackathon for the benefit of small cultural institutions, a series of steps need to be taken. First, it is important to identify the challenge or opportunity that the hackathon is intended to tackle. This could be anything from developing new digital tools to improving the visitor experience to finding ways to bring in more revenue. It is also important to determine the audience for the hackathon, as this will determine who will be involved and how the challenge should be presented. It may be beneficial to involve representatives from a variety of areas, such as computer science, business, and design, as this ensures that participants have access to a diverse range of skill sets (Nolton 2020). Once a challenge has been

identified and the target audience has been determined, participants must be recruited and the hackathon must be organised. To ensure maximum attendance, it is important to advertise the hackathon widely and incentivize participants with prizes or other forms of recognition. It is also important to create an atmosphere of collaboration and innovation by providing mentorship opportunities and encouraging creativity. Before the hackathon begins, the expectations should be set by clearly outlining the rules and timeline for the event. Furthermore, it is important to have a clear process for selecting the best solutions and rewarding the participants. Finally, it is important to collect feedback from participants when the hackathon is over. This will enable organisers to understand what went well and what needs to be improved for future hackathons.

Overall, hackathons can be great for small cultural institutions, allowing them to promote innovation and find solutions to their challenges. Such examples are also presented in Module 1: Open innovation in academia–society cooperation: examples of cultural heritage preservation in situations of crisis of eCHOing. By following the steps outlined above, institutions can host successful hackathons with positive outcomes.

B. A Social Media Campaign for the Benefit of Small Cultural Institutions.

A social media campaign can be an effective way for small cultural institutions to engage with their audiences and build awareness of their offerings. In order to successfully organise a social media campaign for the benefit of small CHOs, there are several steps that need to be taken. First, it is important to develop a comprehensive social media strategy that outlines the objectives and goals of the campaign. This includes defining the key audience for the campaign, identifying the channels to be used, developing a content calendar and establishing a timeline. Once the strategy is in place, it is important to create inspiring and engaging content that reflects the institution's mission, values and offerings. This content should be targeted at the institution's key audience and posted consistently across all channels. Visual content, such as videos, graphics and images, should also be included to make the campaign more engaging and effective.

It is also important to monitor the campaign's performance in order to measure its success. Various metrics, such as follower growth, engagement rates and website traffic, should be tracked in order to assess the campaign's impact. This data can then be used to refine the campaign and ensure that it achieves its desired objectives.

In addition to creating and monitoring a social media campaign, small cultural institutions should also consider developing an influencer marketing strategy (Kolb,

2013). This involves partnering with influencers, such as bloggers and social media experts, to promote the institution's offerings. This can help increase visibility and reach for the campaign, as well as help create content for the institution's channels.

Overall, social media campaigns can be great for small cultural institutions, allowing them to connect with their audiences and increase awareness of what they offer. By following the steps outlined above, institutions can effectively manage their social media campaigns to achieve their desired goals. Some examples can be seen in the [Module 6: Co-designing projects for the cultural sector. Discover the important processes, tools, and skills needed](#)

C. Gamification for the Benefit of the Cultural Institutions.

The gaming industry is overwhelmingly gaining more and more ground. Taking advantage of such a worldwide range of audience, contemporary museums and cultural institutions will be able to update and revitalise visitors' experience by adding innovative features. We should always keep in mind that museums are competing with the broader industry of entertainment. Adoption and application of open innovation's methods and practices aim to reintroduce museums and cultural institutions to the general public.

The incorporation of SGs (Serious Games) into the toolkit of today's museums and cultural institutions may offer an unprecedented range of solutions, regarding visitors' engagement and interaction both with tangible and intangible cultural materials. A good example of mainstream games being utilised in museums can be found in a book project named "Assassin's Creed in the Classroom, Museum, or Gallery" (De Gruyter, 2022). There are several examples of collective activities related to integration of digital tools in the cultural sector. A variety of associates aims to co-create an innovative forum, one quite notable example of a collective activity related to integration of digital tools in the cultural sector is ["Culture Seeds 2022"](#).

Furthermore, the design and implementation of a Gameathlon containing games like the example with Assassins Creed, would fit in with the needs and goals of many cultural institutions. Gamification also comes hand in hand with edutainment, as a tool for museums for disseminating knowledge by tapping into the interaction and motivation these types of tools contribute with, as in this example: ["Edutainment in Museums a Tool for Disseminating Knowledge"](#) .

The discussion concerning gamification as a motivating method for disseminating historical content, summarises that gamification of an educational situation benefits for

example a worker (Haddara, 2022), or a student (Oktaberliana, 2022). This type of virtual and gamification perspective can be connected to The eCHOing project through "Module 3: Development of an Open Innovation approach through the co-creation of Immersive Virtual Heritage".

To organise a gaming event one needs to follow a clear path as to objectives, targeted audience, tools and desired outcomes. Then a facilitating environment should be established and skills shared.

D. Citizen Driven Innovation Project for the Benefit of Culture.

A citizen driven innovation project can be organised for the benefit of cultural organisations by using existing research on citizen driven innovation and then applying it to the unique needs and goals of the organisation. As a starting point, it is important to clearly define the goals and objectives of the project and the desired outcome . Once the project goals have been established, it is important to identify the citizens who will be involved in the project as well as the stakeholders who will be impacted by the project. Once the stakeholders and citizens have been identified, it is important to hold meetings with them to gather more detailed information about their needs, concerns and ideas.

Next, it is important to facilitate an environment of collaboration and dialogue between stakeholders, citizens and the organisation. This is most easily done through open forums and dialogues where everyone is able to contribute to the project and provide their input. This ensures that everyone is heard and ideas from all stakeholders are taken into account.

From there, it is important to build a culture of experimentation within the project. Citizens, stakeholders and the cultural organisation need to work together to create concrete hypotheses for how the project could be successful and then conduct tests to assess the effectiveness of each idea. This allows for the creation of a series of small experiments where implementation, feedback and adjustment is an ongoing process.

Finally, it is important to measure and document the outcomes throughout the course of the project. This will help to ensure that the initial goals and objectives of the project are met and will provide documentation of the results for future projects.

Overall, organising a citizen driven innovation project for the benefit of cultural organisations is an effective way to build meaningful collaborations. By following the steps outlined above, organisations can ensure a successful outcome and build meaningful partnerships.

Examples of Citizen driven innovation are also widely used in citizen research on climate change, or environmental threads and other complex societal issues. However, researchers point out that it is important   to collect copyright consents since,

"Data and other outputs collected from citizen science should be described, documented and shared with permissions to ensure reuse and reproducibility "

(Fraisl, 2022, 17). A citizen science driven innovation project can be connected to The Echoing project through the: "Module 5: Diversity, Inclusivity and the Gender Perspective: Women and Cultural Heritage, a how-to crash course"

4 Impact Assessment Methodology

The potential benefits of OI collaborations in the cultural sector are numerous (see benefit criteria checklist). OI collaborations are seen as a way to help museums, libraries, archives, and other institutions so that they increase their visibility, attract new audiences, and improve visitor experiences. Additionally, these collaborations foster creativity and collaboration between different actors in the cultural sector, allowing for interdisciplinary and intercultural approaches that can lead to new and innovative forms of knowledge. Finally, OI collaborations give institutions the opportunity to share resources and to create content that can be accessed by a wider audience, thus allowing for a more equitable distribution of knowledge (Errichiello, 2018).

It is widely acknowledged among academic researchers that digital transformation processes have become increasingly necessary for the successful engagement of stakeholders in CHOs. For such processes to be successful, there needs to be collaboration between CHOs, HEIs and other relevant partners.

In order to understand modern relationships between archives, libraries, and museums, previous research has focused on examining trends in collaboration in the cultural heritage sector (Allen and Bishoff 2001; Gibson, Morris, and Cleeve 2007). The successful implementation of OIPs requires that certain criteria are met, both during and after the project. To measure the impact of such projects, it is essential to understand the perspectives of stakeholders involved in the project. New technologies are being applied mostly in art museums (e.g. contemporary art museums). As a consequence, the above research marks a need to stand out, expanding our way of

understanding and perceiving what astrophysics, telecommunications and biodiversity might look and feel. New technologies offer us the opportunity to create a holistic, multisensory experience. Thus, the relationship between stakeholders needs to be adjusted according to some of the new technologies being applied in archives, libraries and museums. A great example would also be, ["Notable work by Museums"](#).

4.1. Qualitative Criteria for Evaluating Impact Of OI Cooperative Projects

In order to establish successful collaborations between educational programs and cultural organisations, it is important for both to assess their respective needs and capabilities in terms of resources, expertise, and existing networks. For example, the educational programs may need to assess the specific objectives of their courses and identify specific types of knowledge and skills that they would like to gain from a collaboration. Meanwhile, the cultural organisations should assess their current resources and how they could be applied towards the collaboration in order to increase its potential for success.

Furthermore, in order to ensure the success of the collaboration, the educational programs and cultural organisations should seek to maintain open dialogue and communication. For instance, they should establish a mutual understanding of the aims and objectives of the collaboration. This can help both parties to create a shared vision and create an environment that is conducive to creative thinking and collaboration.

Moreover, it is important to establish a systematic approach to assess the success of the collaboration. This could involve setting specific metrics that both parties can use in order to measure the achievements of the collaboration. Such metrics could include the number of visitors to the cultural organisation, the number of resources shared, or the number of partnerships that are established as a result of the collaboration. By setting and monitoring these metrics, both parties can evaluate the success of the collaboration and assess what future steps need to be taken to ensure its success.

4.2. Social Impact Criteria by eCHOing

The potential benefits of OI collaborations in the cultural sector will be measured through focus interviews, surveys, open calls for new projects, participatory workshops, etc.

The eCHOing Project has thus set up a survey toolkit and an [interview guide](#) to help the collaborating partners during the implementation of the OII during the PR3 and PR4 phase of the project. In order to assess the gain of an OII, partners need to establish measurable criteria for successful outcomes.

In order to be able to achieve realistic collaborative working practices all partners are asked to establish the following criteria framework:

- Clear working practices between CHO and HEI.
- Sustainable working practices to ensure collaboration continues in the future.

- Objectives that are achieved in a timely and efficient manner.
- Project outcomes that are implemented in a way that yields tangible results.

- Possibility of long term collaboration and implementation.
- Communication that remains consistent throughout the project.
- Project outcomes that are reviewed and adapted as needed in order to ensure ongoing success.

Such criteria can be summarised as benefits that are clearly outlined and measurable, which can be realised during and after the project:

Assessment of Gain:
➔ Risks are identified and assessed prior to the start of the project.
➔ Performance is reviewed after completion of the project to assess success or failure.

In addition, PR3 provides a checklist of benefits criteria, indicative of the performance of the agreed outcomes measuring as in a survey:

➔ The number of visitors to the cultural organisation,

➔ the number of resources shared,
➔ the number of partnerships that are established as a result of the collaboration.

Additionally, qualitative evaluations such as surveys and interviews can be conducted with partners and stakeholders in order to gain insights into the impact of the collaboration. Furthermore, data analytics can be used to track the performance of the collaboration over time. This can provide important insights into how the collaboration is progressing and which areas may need improvement. Finally, case studies can be conducted to evaluate the successes and challenges faced during the collaboration and to identify potential lessons learned.

4.3. Survey Toolkit

Research argues that when participants become involved via surveys, after participating in certain tasks, they become active generators of ideas. They might also contribute to the improvement of CHOs which are typically perceived as being:

Detached by the influence of the public, will feel more actively involved in their management, an aspect that is also in accordance with the identification of cultural heritage as a public good. Collaborating with a CHO in such an unconventional, new, and immersive way might then lead individuals to feel more satisfied and willing to become recurrent visitors, and to recommend the museum to others, which in turn will further increase the number of visitors (Capa 2020 pg 7).

The survey tool kit is developed to assist all stakeholders to measure the impact of the OII projects during the PR4 phase of eCHOing collaborations with selected CHOs.

Some general guidelines to consider when one creates data surveys in order to collect ideas and feedback from users/visitors/participants are shown below:

1. Ensure a clear definition of the purpose of the survey before creating it. What do you hope to learn from it?

2. Develop survey questions that are clear and concise, as well as applicable to the cultural experience.

3. Include open–ended questions that encourage respondents to provide more detailed feedback.

4. Provide space for respondents to add their own suggestions and/or comments.

5. Tailor questions to various demographics such as age, gender, or ethnicity to better understand how specific groups might experience the cultural event.

6. Ask respondents to indicate what could be done differently or improved when it comes to the cultural experience.

7. Keep the survey short and to the point; the fewer questions, the better.

8. Offer incentives to complete the survey and boost response rates.

9. Allow respondents to answer anonymously, if possible.

10. Follow up with respondents after they complete the survey as necessary.

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