PR3A6: Summary of the eCHOing methodology

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Consortium

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

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

6	**Federation of Women Association "Kores of Cyclades"**	OSYGY	Greece

Revision History

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V0.7	**27/05/2024**	Christina Kanellou	Transfer document into eCHOing template, visual editing & proofreading

Statement of originality:

This deliverable contains original unpublished work except where clearly indicated otherwise.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

Disclaimer:

author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Table of Contents

List of Figures

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**
HEIs	**Higher Education Institutions**
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 the main beneficiaries and also stakeholders in the cultural and creative sector and small and medium-sized cultural organisations.

PR3 piloted and implemented the Methodology in 28 CHOs in the partner countries before scaling it up in the 4th Project Result (PR4), with the production of a report titled "Lessons Learned and Recommendations to HEIs". Each cultural organisation has defined an action plan containing the criteria and the modalities that allowed the Methodology to be implemented and showcased during various events.

By using an educational approach to **open innovation** collaborations, the eCHOing project not only helped to equip participating students with new skills, but also fostered a collaborative learning environment for educators and professionals.

1. The eCHOing project

The eCHOing project works towards the recovery of the cultural sector, which has been severely hit lately by different crises, in particular small and medium-sized cultural heritage organisations (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. The eCHOing project focuses on creating collaborative and innovative projects through Open Innovation (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 for the 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 five countries. This gathered the 60 best international and European practices of such collaborations (PR1A1). The analysis of the data based on certain criteria gave an overview of actions that needed to be taken in order to facilitate a transfer of knowledge on OI collaborations between universities and museums.

Further on, the consortium has implemented 28 OI projects (OIPs) in five countries and has involved students, HEI staff and NGOs in all of the phases of the programme.

Several tools were produced in order to facilitate the implementation of the collaborative projects and Open Innovation as a collaboration framework, as well as templates and surveys to collect and analyse the impact of the implementation of the OIPs.

Several reports were produced by the consortium all of which can be found at eCHOing website.

Here is a selection of important documents produced by the consortium as the design framework delivered to the CHOs for the implementation of the projects: a policy framework translated in all the languages of the consortium to be used for further collaborations, and an analysis of the data collected through a three stage survey by all three categories of users.

- PR4-D4.1: Design Framework for The Implementation of OIPs
- PR4A11: Policy Brief: eCHOING: Recovery of cultural heritage through higher education-driven open innovation: Academia-driven open innovation for the revival of small and medium cultural heritage organisations (CHOs)
  Translations in different languages: Bulgarian | Estonian | Greek | Italian | Norwegian
- D5.4 Impact report of eCHOing project. The final report based on the data analysis of the collected participant surveys

2. Synthesis of the 5-Stage Organisation
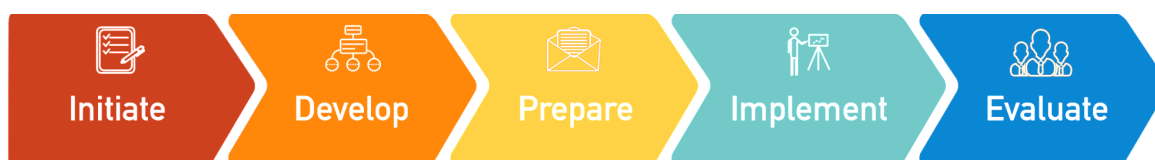
Image 1

A Methodology for the Implementation of Open Innovation Collaborations

This methodology has been created to help higher education institutions (HEI) and cultural heritage organisations (CHO) carry out open innovation (OI) projects together with the aim of creating initiatives that contribute to the sustainability of cultural heritage throughout the world. CHOs can harness the expertise available in HEIs to help sustain cultural heritage initiatives in specific and local contexts, while HEIs also benefit from understanding local challenges faced by CHOs in the community in which both the HEI and CHO are located.

The methodology was developed, piloted, and further refined throughout the duration of eCHOing through implementation in several HEI-CHO projects that took place among eCHOing partners and associated partners. The methodology is truly the result of fruitful collaborations between HEIs and CHOs that has taken into account all stakeholder groups.

The projects carried out using the methodology have helped to establish the usefulness of this as a tool for any CHO organisation that would like to use open innovation as the basis for a collaborative and sustainable OI project with a higher education institution.

The methodology comprises five distinct stages in the development of an OI project. These are:

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 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 - The cultural organisation leads the project work, 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.

These stages are further broken down into two to three action points that can be worked through systematically, helping to prevent repetitions in processes and crucially, helping to prevent the institutions involved from carrying out work that may be redundant, wasting both time and other resources. The methodology has an awareness of the finite nature of all resources available both at HEIs and CHOs. The methodology also includes examples of open innovation and more detailed descriptions regarding the evaluation of a project, a key part in helping to ensure that the initiative is likely to be sustainable and have a positive impact on all stakeholders, including the wider community.

3. A 10–step implementation practical 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.

The eCHOing project could serve as a valuable source of lessons for future initiatives in the field of cultural heritage recovery and university-driven open innovation. The methodology recognizes that HEIs and CHOs are all quite individual, whether within one country or region, and globally. The stages and action points are therefore not prescriptive regarding the size or scope of a project nor its timeframe and can be applied to a range of projects.