HERITAGE PRO
TRAINING KIT

Set of materials to support the Heritage-PRO training scheme

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This training kit is part of the HERITAGE-PRO training scheme which contains five training modules and five corresponding guidelines that have been developed within the Erasmus+ Strategic Partnership **HERITAGE-PRO – Interdisciplinary Training for Professionals of Different Disciplines Towards Sustainable Management and Preservation of Cultural Heritage**. The training modules, the corresponding guidelines and the training kit are available in English, German and Spanish

The training, guidelines, and this training kit focus on interdisciplinary aspects in cultural heritage preservation and have been developed by six public and private European institutions, networks, development agencies and associations, all of which are linked to cultural heritage preservation. The training at a glance:

HERITAGE-PRO TRAINING SCHEME

Find out more HERE

Training Module 1 and Guideline 1
Global Challenges and Opportunities in the Field of Cultural Heritage

Training Module 2 and Guideline 2
Efficient Teamworking and Effective Interdisciplinary Conflict Resolution

Training Module 3 and Guideline 3
Valorisation of Cultural Heritage

Training Module 4 and Guideline 4
Participation

Training Module 5 and Guideline 5
Effective Communication in an Interdisciplinary Environment

1 ABOUT THE HERITAGE-PRO TRAINING SCHEME

As a professional in cultural heritage management you have your own background: you might be a cultural manager, an art historian, an architect, or a geographer. You might also have a business administration or real estate management background. Entering the world of cultural heritage is a true challenge. Its related complex social, economic and environmental processes include multiple layers as well as technical and planning steps with its numerous specialists, stakeholders and interests. You may have to lead cultural heritage preservation projects, moderate the interdisciplinary team, or even resolve conflicts.

The HERITAGE-PRO training scheme, including this training kit, was developed by an interdisciplinary team for interdisciplinary purposes in cultural heritage management. It is based on multiple experiences of the European partners aiming to further improve cultural heritage management. This training is based above all on the insight that the cooperation of different professional groups in complex conservation projects is a great challenge, which receives far too little attention in related university courses and professional training. Therefore, this training is conceived as additional vocational training which aims to provide you with tools that can be directly put to use in your professional practice.

2 ABOUT THIS TRAINING KIT

The training kit is a “ready-to-use” implementation tool. It addresses any user of the HERITAGE-PRO training and provides a set of materials and templates to support and ease organisational efforts.

This training material has especially been created for cultural heritage managers with little or no professional experience. Obviously, as in any training process, having some field experience will help you to better understand some of the processes described here, as you will be able to apply them to the practical cases you are familiar with. For this reason, we encourage you to find examples in your own practice. But, even if you have no professional experience yet, we have tried to provide you with some very practical and easy-to-use material, which we hope you will find convenient in your daily professional activity. Or, if you are a teacher using this toolkit with your students and you have the feeling that the case studies proposed here are not relevant for them, please feel free to select use cases and examples that are closer to their scope and will help them put in practice the contents presented in this Training Kit.

Depending on your level of knowledge and experience, you may find some elements of this Training Kit more interesting than others. It has been designed to give you great flexibility in this regard. You can use it as a complete training pack or you can go directly to the sections you find most useful or to the materials you need at a specific point of your project.

Please be aware that this Training Kit is not intended to be used for the planning of a project from scratch but for the implementation phase, once the project has been designed. It is also not intended to replace the training materials of a university or a master's degree, but to complement it as vocational learning to improve interdisciplinary management skills at practical level.

The HERITAGE-PRO team is aware that at an implementation level you will probably be organising the interdisciplinary work in parallel to your usual workload. We also know that if we want this training scheme to be successful and taken up by cultural heritage managers like you, we have to give you as much support as possible, especially in those procedures which may appear easy to handle, but are actually quite time consuming.

In interdisciplinary projects, bringing numerous target groups together - all of whom may have different expectations – to the same round-table meeting, and preparing the whole procedure is both time consuming and challenging. This is especially the case if you don't yet have broad experience in the job, or if you are simultaneously dealing with other workflows.

This training kit will help you solve practical issues, such as the following:

- How to draft an invitation to target groups in order to provide all necessary information on the round tables, while also making the background and vision of the procedure clear.
- How to inform the media about on-going preservation activities.
- How to generate content for social media activities.
- How to evaluate a project and the outcomes of round table sessions and gauge the opinions of the different participants for future improvements?

To make access to this training kit easier and more practical, we have grouped the materials and templates into three groups: useful documents **BEFORE** you start a preservation project, documents you might need **DURING** the project, and useful documents to be used **AFTER** the project.

For each stage the training kit includes the following tools:

BEFORE the start of the project:

Checklist of considerations when setting up the team: who do you need in the team? How can you choose the relevant complimentary expertise? When is the best time for your target group to be involved? Should you involve volunteers?

Checklist of potential stakeholders you may consider including in the team.

Invitation templates: how to address your most important stakeholders, provide necessary information about the round tables and make the background and vision of the project clear etc.

Checklist and recommendations to prepare the round-table discussion: how to create a good working atmosphere, the minimum and maximum number of people, room availability, materials you may need (audio-visual equipment, paper, pens, a flipchart, water, supplies for coffee breaks, lunch, etc.)

Checklist and recommendations for meetings: send agenda at least 2 days before the meeting, if you expect the participants to prepare something for the meeting discuss it with them at least 5 days before the meeting, etc.), take minutes, the structure of the minutes, assign who takes the minutes, etc.

Checklist to test the level of sustainability of the project, e.g. is the project addressing gender issues, climate change? Is the project contributing to a more inclusive society, etc.?

DURING the project:

How to run the kick-off meeting: request presentations from participants, set objectives of the project by consensus, assign roles and tasks, etc.

Checklist and recommendations to manage a meeting: how to moderate the meeting, how to ensure everyone feels part of the team, how to motivate and encourage them to perform together and build trust, etc.

Worksheets to be used during the sessions: set objectives, tasks, deadlines, assign people responsible for accomplishing the task, potential problems and how to solve them, etc.

How to solve potential conflicts within the team.

How to address potential deviations during the project.

Evaluation template to summarise the outcome of round-table sessions and check the opinions of different participants for validation and future improvements.

Checklist for media planning.

How to make a press release to inform the media about on-going activities.

Template for a press release.

Checklist for social media planning.

Examples of social media content.

AFTER the project is finished:

How to make a follow up plan.

Evaluation template for the final outcome of the project, lessons learned and future improvements.

Template for a press release to inform the media about the completion of the project.

How to maintain an active presence on social media beyond the completion of the project

Template for education providers who teach the HERITAGE-PRO modules. This can be given to their learners, stating the contents taught.

The training kit is compiled in an electronic folder on the project's website ready to be downloaded either as individual documents or as a whole. You can use one or several of these templates at your convenience.

3 BEFORE THE START OF THE PROJECT

In this section we cover the aspects that will help you forward plan activities related to your project, in particular those concerning the team. We'll also look at how to draft an invitation, how to prepare round-table meetings and how to evaluate the sustainability of your project.

3.1 SETTING UP AND WORKING IN AN INTERDISCIPLINARY TEAM

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 2 Unit 1
HERITAGE-PRO Module 2 Unit 2

The type of professionals or volunteers you will need in your interdisciplinary team depends largely on the focus and objective of your project. Therefore, we recommend asking yourself these questions before setting up the team:

- Do you want to increase the visibility of a cultural heritage site and attract more visitors?
- Do you want to involve different communities in the preservation of a cultural heritage site?
- What things do you want to be different to the status quo once your project is finished?
- What resources do you have (financial resources, time, workspaces, infrastructure etc.)?
- What work is going to be done by the team?
- Have you defined milestones, a workplan and a clear timeline?

Setting up clear objectives will help you identify the profiles needed. (See more in HERITAGE-PRO Module 2 Unit 1 on project management).

There are some general factors and recommendations that you should consider when setting up an interdisciplinary team. If these recommendations are followed by the entire team, they are the best prerequisites for successful teamwork. You should continuously keep verifying that these checklists are being fulfilled within your team. Take time to go through and think about each point of your teamwork once in a while.

When setting up a team keep to the key team principles:

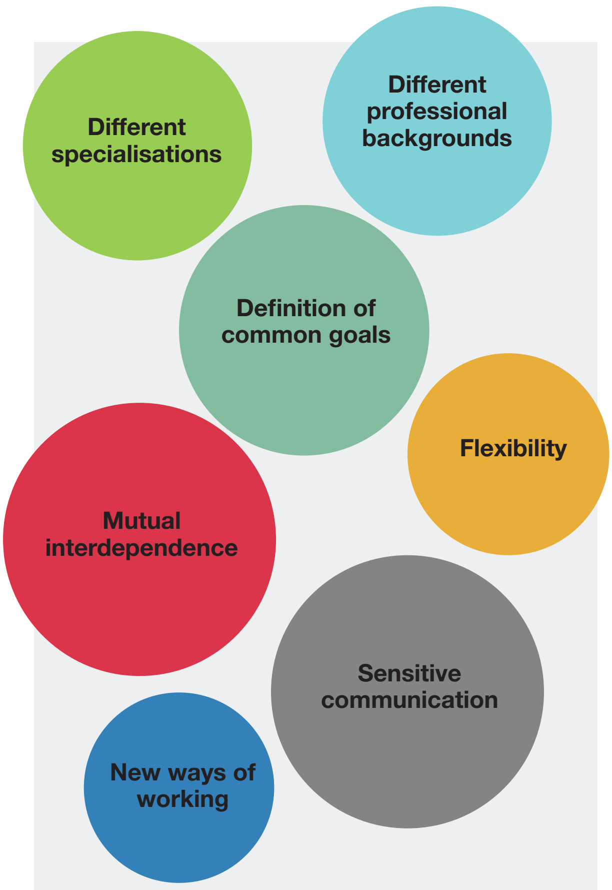
- All team members should have a common understanding of cultural heritage and the values their work should keep to. A first step is to define your project (see Module 2 Unit 1). In order to make it clear. You could for example, hold a brainstorming workshop on this before the project starts. Also, if new members join the team, they need to be inducted and led by all other team members.
- All team members should be expected to make a contribution of equal value. In this way, the contribution of any given profession will not be worth any more or less than that of any other.
- Professionals need to get to know about each other's work as well as strengths and interests. Make sure that the team really works together and

has a constant flow of communication and work exchange. Regular team meetings with active involvement from all parties can help with this.

- Try to create a stable team without many changes.
- The team should be co-located in one office, rather than in each party's own consulting room. In case you have teams working virtually at a distance, you should hold common virtual team meetings. Still, in order to get to know each other, you should have at least two meetings on site per year, with all team members working together for a number of days.
- Team members should be around for advice or to discuss their concerns regarding cultural heritage issues.

Crucial features of interdisciplinary teams

In order for a team to be truly interdisciplinary, you should consider the following features of interdisciplinary teams (more in Module 2):



Conditions and behaviours for successful interdisciplinary teamwork (more detailed in HERITAGE-PRO Module 2 Unit 2)

- The whole team should jointly define, determine and accept the project's shared challenges and objectives.
- The team size will depend on the challenge/ objective, but ideally it would be better not to exceed twelve people as lager teams are more complicated to manage. If the team is bigger, you need to be aware that you will need more time for efficient preparation and more time in meetings. You might consider splitting a bigger team into smaller groups for specific tasks, but try to keep to the interdisciplinary approach.
- The atmosphere should be relaxed and informal.
- All participants must be able to express their opinion openly and be listened to.
- Discussions need to focus on the factual aspects of the problem.

Any personal differences or group conflicts that arise must be immediately dealt with and resolved. This should not interfere with problem solving within the project.

- The moderator should moderate the team and should not dominate either group actions or individual members.
- Decisions should be arrived at through consensus.
- The result of the teamwork should be documented and submitted to all team members for final acknowledgement and/or approval.

3.2. HOW TO BUILD UP, MANAGE AND MAINTAIN THE COMMUNICATION WITH STAKEHOLDERS

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 4 Unit 2
HERITAGE-PRO Module 4 Unit 4
HERITAGE-PRO Module 4 Unit 5

STEP 1 IDENTIFY STAKEHOLDERS

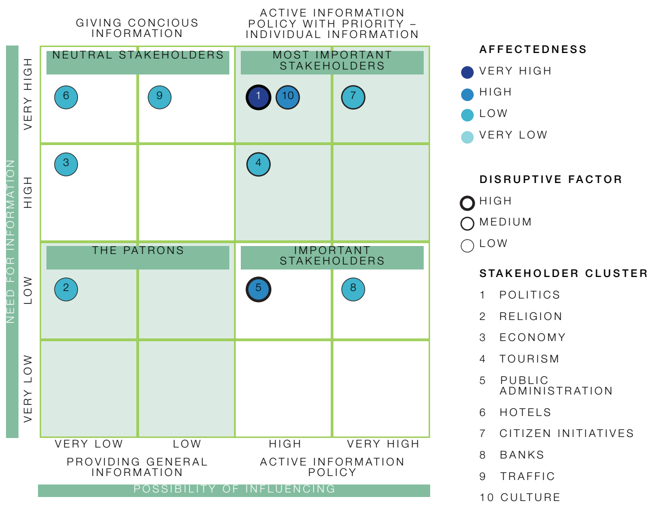
- Identify all possible stakeholders affected in any way by your project.
- As far as is possible, collect all names of responsible persons, addresses and contact details. Please be aware of the data protection regulations in your country.
- **Note**: If you have a lot of stakeholders, you should put them into clusters (e.g. Politics (1), Religion (2), Economy (3), Tourism (4), Public Administration (5), Hotels (6), Citizen initiatives (7), Banks (8), Mobility/ Traffic (9), Culture (10), Craftspeople (11), etc. (this largely depends on your project).

STEP 2 EVALUATE, ASSESS AND ANALYSE YOUR STAKEHOLDERS

- Identify special groups whose support you consider essentially important for your project.
- Evaluate your stakeholders with regard to the following categories. This will vary depending on the project. (The following examples are based on the restoration of a cultural heritage site):
  - How high the necessity to keep the stakeholder informed is. (Very high, high, low, very low). *E.g.: project partners (municipalities, organisations, citizen initiatives etc.) could have a very high need for information; religious institutions could have a low need for information if they are not one of your project partners.*
  - How much the stakeholder could influence the project. *Public administration (e.g. monument protection authorities) are very likely to influence your project, as are banks, project partners or citizen initiatives. Hotels, for example, could have a lesser influence.*
  - How much the stakeholder could be affected by your project. *Owners of the cultural heritage site (municipalities or private owners) could be very much affected by your project; traffic/infrastructure is usually not affected much.*
  - Disruptive factor (high, medium, low). *Public administration (e.g. monument protection authorities) has a high disruptive factor; retailers have a low disruptive factor.*

You can group your stakeholders in an easy scheme based on the evaluation of the categories (see picture and possible list below) and put them into a matrix (see picture below).

Need for information vs. Influence vs. Affectedness vs. Disruptive Factor



Source: Own creation

STEP 3 COMMUNICATING WITH YOUR STAKEHOLDERS

Most important stakeholders

- Establish cooperation and maintain good relations
- Manage them closely
- Give personal attention
- Organise workshops with them
- Give answers to any important questions
- Contact:
    - Invitations to meetings by letter/phone
    - Personal meetings
    - Personal presentations on your project
    - Regular contact through meetings, phone, emails and letters

Important stakeholders

- Foster existing cooperation channels
- Talk to them at meetings and conferences
- Contact:
    - Invitations to meetings by letter/phone
    - Personal meetings and presentation
    - Regular contact via email, newsletters, or social media

Neutral stakeholders

- Inform regularly about the development of your project.
- Give them the attention they deserve.
- Contact:
    - Information by post with invitation to newsletter service
    - Newsletter by email/post
    - Regular mailings, social media

The patrons

- Give them general information on your project
- No special activities
- Minimum expenditure
- Contact:
    - Information by post with invitation to newsletter service
    - Newsletter via email/social media
    - Contact once a year (or when necessary)

STEP 4 MEETING WITH YOUR STAKEHOLDERS

Contact them according to their "stakeholder category" via email, phone or letter

- Evaluate responses: use the form for the overview of stakeholder information (see below).
- Ask for meetings, make appointments
- Create a conversation guideline for each appointment/meeting with a stakeholder before and after the meeting (use the overview of stakeholder information for this, which is included below)
- Prepare for your meeting and give a presentation

POSSIBLE LIST OF STAKEHOLDER CATEGORIES

How many stakeholders you have and how you can group them will depend on your project. Possible groups of stakeholders could be:

- Accommodation providers
- Professional associations
- Education & social affairs
- Citizens' initiatives
- Retail trade & commerce
- Forestry/hunting
- Local authorities
- Social & public institutions
- Emergency & rescue services
- Chambers of commerce
- Credit institutions
- Cultural actors
- Agriculture & viticulture
- Ministries & public administration
- Nature conservation
- Policy makers
- Religious organizations
- The tourism sector
- Clubs & associations
- Traffic agencies
- Traffic & trade associations
- Utility companies
- Economy
- Other

Overview of stakeholder information (use it only for your internal documents, fill out before and after the meeting. Change the highlighted words to your own information.)

ORGANIZATION / INSTITUTION	
Contacts: (Institution, name, address, phone, mail)	*HERITAGE PRO Project* *Jane Doe, 123 Main St* *Anytown, EU* *Phone: +00 1234 5678* *Jane.Doe@heritage-pro.eu*
Contacts so far:	*Conversation at….* *Letter from Jan. 01, 2020 – Answer by Jan 03, 2020* *Call from Jan. 05, 2020*
Information or discussion appointment:	February 02, 2020; Venue: Office Jane Doe, 10.10 am – 11.00 am
Discussion participant(s):	Jane Doe, project coordinator of HERITAGE-PRO and other EU-funded projects (*likes to drink coffee with sugar and sweet milk*) John Doe, project partner in HERITAGE-PRO; Professor for Real Estate Economics at Madrid Complutense University (likes to drink black tea)
Information about the organisation / institution	
Purpose of the organisation:	
Members / employees:	
Contact committee:	
Target group (investor, citizen / multiplier / association / media etc.):	
Need for information:	
Potential of influence:	
Reasons for concern:	
Interference potential:	
Potential for interference:	
Fears/expectations:	
Interest in the project:	
How could the organisa-tion contribute to my pro-ject?	
Objective of communication/ discussion:	
RESULTS OF THE MEETING	
Most important aspects:	
Attitude towards the project:	
Agreements concluded:	
Next steps / further strategy:	

3.3 INVITATION LETTER TEMPLATE FOR YOUR KEY POTENTIAL STAKEHOLDERS

Edit the green marks according to your needs/project

Address

Address of the project

T +123456789

F +123456789

janedoe@project.eu www.XYZ.EU

July 24,

Re: New cultural heritage project. We are pleased to give you the following information.

Dear XYZ,

Your *organisation* is of great importance for the new cultural heritage project XYZ.

We would therefore very much like the opportunity to talk to you and show you the potential of our *project at the Heritage Site,* in order to give you an overview of the project, explain which activities are planned and what opportunities our project offers for companies and citizens in the region as a whole.

Our project has its foundation in *[explain the basic information, reasons and objectives of your project in* ***three short sentences****]*.

We will be happy to be your contact point for a **discussion or an information event** in your *organisation.*

If you are you interested in receiving personal information, we would be delighted to arrange further contact in the form of a meeting between *XYZ to XYZ [months]* 2020 on either *Tuesdays, Wednesdays or Thursdays*. If this interests you, please contact Jane Doe using the contact information provided.

Thank you for in advance for your feedback and your interest in *[name of the project]*!

Yours sincerely,

[Your name + personal signature]

Attachment: Flyer

3.4 ANALYSING THE POTENTIAL VALORISATION OF YOUR CULTURAL HERITAGE ASSET

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 3 Unit 1
HERITAGE-PRO Module 3 Unit 3
HERITAGE-PRO Module 3 Unit 4

The umbrella term "valuation" incorporates the processes involved in interdisciplinary cooperation which aim to generate positive outcomes, and as such provides excellent opportunities for projects. While it is possible to carry out a project in the traditional way – commissioning external companies and experts to undertake the work – it is highly preferable to choose the interdisciplinary approach, given the advantages that it brings with it. We should clarify at this point that the term "valuation" does not refer to an economic analysis, as it is often misunderstood. Rather, it is about putting your project into a larger context and using it as a catalyst to bring about numerous positive effects.

What could such effects be? In HERITAGE-PRO Training Module 3 as well as in the HERITAGE-PRO Guidelines you will find many examples that will inspire you. However, a good way to start is by asking yourself who could benefit from your project, which (new) value chains could be created and where your project could have positive social, organisational, local and regional planning, environmental or economic effects.

The principle behind this is clustering: you identify different positive effects your project could have and bring together in a cluster (or group) the people and companies that could contribute to it.

[1] Michael, E. (2007): Micro-Clusters and Networks: The Growth of Tourism, Netherlands, Elsevier, 24-27, UK

According to Ewen Michael[1] three forms of clustering (of grouping) can be distinguished:

- Horizontal clustering: the co-location of competing companies operating at the same stage in the value chain. For example, hotels that cooperate and compete with other hotels.
- Vertical clustering: the co-location of companies operating at different stages of the value chain, for example the automobile industry and its suppliers.
- Diagonal clustering: cooperation between companies and the creation of a pool of previously separate products and services that the consumer perceives as one product.

So, what kind of clustering is the right one for your preservation project? Have a look at our checklist below which will help to answer this question.

- Who (which visitors, customers, which businesses) can directly benefit from the valorisation of your heritage site/cultural heritage? E.g. cultural tourists visiting the site; artists or entrepreneurs using the site for creative processes and production of art, services, etc.

- Which additional facilities or businesses do these groups expect or need? E.g. cultural tourists might also desire exciting hotels and restaurants, shopping facilities, educational opportunities (which may be in different languages) and mobility services. Visual artists might need art galleries and art supplies. Entrepreneurs need research and business facilities, banks and affordable amenities to rent.

- Does that cluster/project exist and can it easily be connected? Or, can it be created? Can the cluster be improved in any way?
- Which leading industry already exists on-site that could benefit from the cultural heritage site? E.g. a site dominated by shopping, sport or health facilities could profit from additional cultural tourist opportunities. A site dominated by traditional industries or large-scale industries might need a business incubator in an inspiring historic site. Or the existing community of artists in an art academy might need an inspiring historic site to expand and attract other artists and arts.
- What can be done to improve what is on offer?
- What can be done to improve access to the above?

Before embarking on a cultural heritage preservation project, we recommend that you consider its potential social, economic and environmental valorisation. To help you do this, we have created the following checklist:

- Will this project have any positive impacts in the five sectors of public interest described in the "Pentagon of value aspects of public interest" in HERITAGE-PRO Module 3 (politics, economy, social structure, culture and/or environment/ecology)?
- What do you think would be an "appropriate use" of your cultural heritage asset, as defined in HERITAGE-PRO Module 3 Unit 3?
- What potential social impacts can your preservation project help to achieve? E.g. will it stimulate social cohesion in communities by helping understand common history? Will it help integrate people at risk of social exclusion by promoting new activities? Will it contribute to strengthening the quality of life for elderly people, disabled people, migrants or refugees?
- What potential economic impacts can your project help to achieve? E.g. will the village, the city or the region gain wider visibility thanks to your project and, as a consequence, lead to the opening of new businesses and/or attract more visitors? Could it become the place where an international congress of researchers will meet?
- What potential environmental impacts can your project help to achieve? E.g. will it stimulate the proclamation of new rules for the protection of cultural heritage and its environment?
- Who do you think would be "the right players around the table" to achieve these targets, as explained in HERITAGE-PRO Module 3 Unit 4?

The checklists above will help you to get a general overview of the opportunities that could develop from your preservation project. Have a look at chapter 3.7 for many more details on what can happen after the organisation of the first round-table discussion with possible contributors.

3.5 HOW TO ORGANISE A ROUND-TABLE MEETING

The general purpose of a round-table meeting is to hold a close discussion and to explore a specific topic. By involving all participants on equal footing, it aims to confront specific issues. The individual aim will vary in practice, but in order to increase the possibility of success, some basic conditions need to be fulfilled. The following paragraphs will lead you step by step through the different **logistical aspects** of setting up a good working environment for a round-table meeting.

STEP 1 IDENTIFY A SUITABLE WORKING SPACE

Identify two or three working rooms/spaces (if external from your organisation) based on the number of confirmed participants from invitations sent previously. Choose your working space based on the amount of natural light, the shade of the light (bright white office lights can become tiring after spending an entire day under them), comfortable chairs, the ease of rearranging chairs, desks and other furniture, costs (if you have to rent it externally), available equipment (either on hand in the room, or that which can be requested and sent as needed).

Have in mind that "corporate" spaces are not always the most effective or productive working areas, especially for people from the cultural heritage sector. "Creative" spaces, rooms in old castles/houses with "more spirit" can often be more inspirational and relaxing for team working. That does not mean that the space should be completely informal – find the balance!

Choosing a cultural heritage building/room for your meeting could be a good choice if it fulfils other criteria too.

STEP 2 ARRANGE REFRESMENTS

Make sure you ask your participants well ahead of the meeting (but only upon the confirmation of their attendance) about their dietary requirements and allergies. This will help you coordinate the correct orders with catering companies or your internal team. Assess food quantity well – avoid ordering too much and wasting food!

Make sure you provide different options – not everyone drinks coffee, for example. Having tea and other beverages is highly recommended. The same applies for fruit and other small snacks.

If you are organising a meeting in a specific region/city, it would be nice to include some typical products among the food and drinks on offer – some culinary traditions are included in the UNESCO Representative List of the Intangible Cultural Heritage of Humanity and the Register of Good Safeguarding Practices. However, do not overdo it – food is not the be all and end all of your meeting.

Ensure reusable glasses, cups, plates etc. are used - think of the environment when organising a meeting. Your attendees will notice!

STEP 3 ENSURE NECESSARY TOOLS AND EQUIPMENT ARE AVAILABLE

Make sure you have audio-visual tools and equipment and a laptop to be used for presentations, if needed. Ensure you have Wi-Fi internet connection, or at least cable internet access. Test the electronic equipment at least one day before the meeting to make sure that everything works.

Depending on the nature of the meeting, you might need different devices for presentations.

Ask your participants, in the case that they are giving presentations, about the format they need to work in and if they need any special equipment or have special requirements.

Make sure you have adapters for different types of computers and external devices or ask your experts to bring them with them.

Ensure a flipchart is available in the room with felt pens of different colours. If the work is organised into more groups, ensure you have more flipcharts.

STEP 4 ENSURE YOU HAVE NECESSARY MATERIALS

Prepare a set of materials for each participant.
A set should include paper and notebooks, pens and any additional material that is needed for the meeting (agendas etc.).

An example of an agenda:

LOGO of your
project/organisation

Title of the meeting
Date of meeting, place of meeting/venue, time of meeting

Day 1, date
Time (from-to), room

Time (from-to): Registration of participants and welcoming coffee
Time (from-to): Welcome speech / opening remarks / introduction by the organiser / host of the meeting (indicate the name and affiliation)
Time (from-to): Updates and remarks since the last meeting and queries about minutes from the previous meeting (if applicable)
Brief overview of the current meeting (how it is structured and roles)
Time (from-to): Presentation title
Presenter's name and affiliation
Q&A / discussion / exchange of views
Time (from-to): Coffee break
Time (from-to): Presentation title
Presenter's name and affiliation
Q&A / discussion / exchange of views
Time (from-to): Lunch break
Time (from-to): Presentation title
Presenter's name and affiliation
Q&A / discussion / exchange of views
Time (from-to): Coffee break
Time (from-to): Presentation title
Presenter's name and affiliation
Q&A / discussion / exchange of views
Time (from-to): Discussion
Time (from-to): Next steps

Day 2 (in case the meeting takes place over several days, make sure to list all activities each day)

Avoid printing too many copies of agendas or bios, for example, and using too much paper– especially if these documents were already provided via email – think of the environment!

Instructions for creating bio of participants

Write a mid-length description (100 words or three to five short paragraphs) of your current role, professional aspirations, and biggest achievements. Short professional bios allow you to go into a bit more detail and it's generally good to include:

- A picture
- Name and surname
- Your institution/company/organisation
- Your current role or professional tagline - What do you do? You can either list your current title or include a short, descriptive phrase about your role.
- Your goals and aspirations
- Two or three of your most impressive and relevant achievements - particularly in professional bios, you will need a few accomplishments to show off what you have done in your career. Choose the top two or three large milestones from your career.

One quirky fact about you (if it is appropriate) - this may not be necessary in a shorter bio, but for a website or similarly professional bio, you may want to add a sentence that describes something you do when you're not working.

3.6 CHECKLISTS AND RECOMMENDATIONS BEFORE AN INTERDISCIPLINARY ROUND-TABLE MEETING

As explained in section 3.5, a round-table discussion is often used as a symbolic seating arrangement. For example, at a conference it might be used to clarify different interests or to deal with a crisis. Representatives of various institutions, without any levels of hierarchy or chairpersons, may want to come to a compromise recognised by all sides. The round-table discussion can also be a form of citizen involvement in dialogue and participation forums to promote cooperation between public institutions and citizenship.

The round-table discussion is therefore the ideal working environment for discussions that are conducted on an equal footing and without hierarchies. It is important to note that a round-table meeting is not interdisciplinary per se. Only the participation of professionals from different disciplines makes it an instrument in the sense of interdisciplinary cooperation.

CHECKLIST

Eight weeks before the round-table meeting. What do you need in advance for an interdisciplinary meeting?

- Have you checked if it is the right moment for this meeting? Or are decisive components or persons still missing that are needed to achieve goals?

- Have you decided on the format of the meeting, e.g. face-to-face or online? For the first meeting, which prepares for a bigger project, we highly recommend a face-to-face meeting (if conditions allow, check relevant COVID information and travel restrictions in your respective country).

- Do you know what you actually want to achieve - what is the intention of the meeting? Do you want to inform the participants, make decisions, solve a problem or find new impulses? Be clear about what the outcome of the meeting should be.

- Have you considered involving an external moderator so that you are able to follow the meeting better?

- Have you drafted an invitation list that covers all relevant disciplines that you would like to participate in your project? These disciplines should usually correspond to the objectives of the project.

- Have you identified key players you need for this meeting and made sure that they are available?

- Have you identified the most relevant stakeholders and multipliers whom you would like to join the meeting? These could be colleagues from other cultural heritage sites, the local regional developers, business developers, tourism representatives or citizens.

- Have you considered costs/resources of this meeting for each participant, and do you think they are interested in investing in these costs/resources in terms of professional time, income, personal time?

- Have you checked the invitation list with your superiors and with experts in your institution?

- Have you decided on an "inspiring" meeting place? (This could be somewhere other than an office.) A pleasant and inspiring meeting place where the team members feel comfortable will help create a more favourable atmosphere for participation and fruitful exchange.

- Did you make sure that the meeting room/ place is available?

- Have you made sure that the timing of your invitation won't result in the exclusion of certain professionals, e.g. because this is an important time slot for other tasks for them or because important events that may distract your participants are taking place on the same days (big conferences, trade shows, etc.)? A way around this could be to use Doodle or other online meeting scheduling tool.

- Have you asked about and checked the date with invited persons/colleagues/stakeholders whom you would like to participate actively e.g. by giving a presentation or offering some other special input?

- Have you considered sending a "save the date" at least eight weeks before the meeting? At this point you should inform participants about the purpose of the meeting, the main topics to be covered, the location and the date. Note that in order to attend, some people may need to book transport and accommodation in advance.

CHECKLIST

Two weeks before the meeting. What has to happen before the event?

- Create the agenda with these three issues in mind:

  1. Set the right priorities

  Sort the items you want to cover - start with the most important topic and finish with the least important topic. In this way, the really decisive points will not fall by the wayside in case of doubt.

  2. Discuss maximum 6 topics

  Ideally, we recommend to include a maximum of 6 items in your agenda to be discussed per session, so as not to exceed the previously chosen period.

  3. Set the time and special time slots

  Schedule the overall time as well as specific time for certain topics. This way you don't lose track of the meeting and can maintain focus. Consider breaks and, maybe, additional events like a guided tour or a get together after the meeting.

- Have you been sure to involve all participants and that the topics on the agenda affect all of them?

- If you expect some participants to prepare something specific for the meeting, did you get in touch with them at least two weeks beforehand and discuss topics with them?

- Have you appointed people responsible for individual topics? These individuals should provide information, explain data, and lead a discussion on the topic.

- Does the structure of the meeting allow enough discussion time for the most important issues?

- Have you drafted an invitation which contains all relevant information concerning eventual preparations, the background, vision, references, invitees, and goals of the meeting?

- If you are going to have a moderator, does he or she know his/her role (this could be as a moderator, ice breaker, motivator, etc.)?

- If you have any co-presenters, are they aware of their time limitations for their presentations and that you would like to stick to that time frame?

- Have you drafted an agenda that clearly indicates the points to be discussed, the schedule and any other relevant information?

- Have you considered sending the invitation and agenda to the expected participants two weeks before the meeting at the latest?

- Have you considered sending any documents such as hand-outs/factsheets with the agenda?

- Have you considered any registration needed for the meeting in order to be sure that the space is sufficient? Have you considered checking the registrations in order to be sure that the most relevant people are available?

- If you expect the participants to prepare something for the meeting, did you clearly express this in your invitation?

- Did you assign who is going to take the minutes, how they should be drafted (structure) and when they should be made available (at the end of the meeting or afterwards)?
- Have you thought about the dissemination of the meeting, e.g. by inviting a member of the press?

CHECKLIST

One or two days before the meeting: What should you remember before the meeting?

- Did you consider sending a reminder two days before the meeting?
- Have you arranged any technical facilities needed (beamer, extension cables, additional power sockets, WIFI access)? Have you checked that they are working properly?
- Have you arranged technical support if necessary? (a computer technician, an audio-visual technician, etc.)
- Have you considered/arranged an informal get-together after the meeting, e.g. with drinks and snacks?
- Have you or the moderator prepared a lively and interesting way for introducing the participants to each other that does not take much time?
- Are you well prepared for the meeting in terms of your presentation, the identification of points to be discussed (as well as those which will not be discussed) and time keeping tools?
- Have you prepared a press release about the event?
- Have you prepared social media content (posts on the relevant platforms) for the meeting?
- Have you considered how to evaluate the outcome of the round-table meeting (e.g. with a questionnaire or an online tool) in order to obtain the opinions of the different participants and to make future improvements?

CHECKLIST

One to five days after the meeting: What do you need to do to monitor success?

- Have you analysed any problems and challenges you had to deal with in the meeting?
- Have you clearly identified any challenges/problems that could come up in the preparation of your project? (If so, you may find it useful to check the “How to solve potential conflicts” guide in this training kit).
- Have you identified those people/experts with whom you need to have bilateral communication?
- Have you sent the minutes to all participants including next steps and important future dates?
- Have you made a follow up plan to make sure that what was decided at the meeting will be accomplished by the accountable persons and within the agreed deadlines.

3.7 HOW TO SET UP YOUR PROJECT AS A DRIVER FOR SUSTAINABLE DEVELOPMENT

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 1 Unit 2
HERITAGE-PRO Module 1 Unit 3
HERITAGE-PRO Module 1 Unit 4

Following on from the recommendations already provided in section 3.4 on the valorisation of the effects of your cultural heritage preservation project, we can now go into more detail. Whether your project is developed in a rural or urban area, it has the opportunity to have a positive impact on society and the environment. Use this checklist to reflect upon your project as a driver for sustainable development in terms of social, economic or environmental issues, and particularly with regards to the United Nations 2030 Agenda.

YES / NO POTENTIAL IMPACT

- ○ ○ Will your project contribute to the quality of life in the area by actively engaging a plurality of actors?
- ○ ○ Will your project promote a multidisciplinary partnership by supporting interactions between different agents in society? (E.g. between public administration, technology, education, social integration, economic development, etc.).
- ○ ○ Will your project contribute to improving education either for professionals, for students or for the general public? (E.g. by fostering vocational training, capacity building, training in schools, guided visits, lifelong learning, etc.).
- ○ ○ Will your project create new jobs?
- ○ ○ Will your project contribute to boosting the local economy?
- ○ ○ Will your project enable a digital shift or engage with new technologies to provide wider access for the public to cultural heritage?
- ○ ○ Will your project contribute to stopping climate change? (E.g. by using renewable energies that improve energy efficiency; by using soft maintenance techniques in the preservation and restoration of buildings; by recovering traditional trades such as blacksmithing, carpentry, masonry, stonework, etc.).
- ○ ○ Will your project contribute to building a more inclusive and reflective society? (E.g. by promoting the integration of migrants, people at risk of social exclusion, people with disabilities, etc.).
- ○ ○ Will your project enable an intercultural and intergenerational dialogue, reducing inequalities and helping build more inclusive communities?
- ○ ○ Will your project help fight inequalities related to gender issues?
- ○ ○ Will your project encourage the surrounding community to get involved?
- ○ ○ Will your project encourage participation for all “irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status” (United Nations Sustainable Development Goals, SDG 10)?
- ○ ○ Evaluate whether one of the outcomes of your project could be to obtain official acknowledgement of your tangible or intangible heritage asset (from a national organisation, such as the *“Bien de Interés Cultural”* label in Spain, or the UNESCO World Heritage listing).

3.8 HOW TO HANDLE PROJECT RISKS IN AN INTERDISCIPLINARY TEAM

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 2 Unit 4

Risk management is part of project management. A risk analysis prepared before the start of the project is of great importance, especially in interdisciplinary project organisation. Risk management includes risk identification, risk analysis, risk quantification, risk aggregation, risk assessment, risk evaluation, and risk communication. Risk management is a central component in making threats, dangers and risks visible and showing internal project partners as well as external stakeholders that a project team is being proactively prepared for them.

The COVID-19 pandemic 2020 has shown the importance of risk management, although the pandemic was certainly not one of the risks that could have been predicted by a team. This makes it more important to be aware, even in interdisciplinary teams, that there are risks that can only be managed when they occur. However, the interdisciplinary cooperation will lead further than coping in individual decisions.

Risk assessment is a process that involves collecting information, assessing whether risks are likely to occur or not and the severity of the consequences if they do occur. Interdisciplinary teams have the great advantage of being able to oversee many more risks than teams that are mainly from one work area or sector. Practitioners in particular know from their experience what risks can occur and how to face them. Risk management also means having better control over possible risks and impacts on a cultural heritage project.

Risk assessment and management should therefore be a collaborative effort in an interdisciplinary partnership, where responsibility for risks lies within the interdisciplinary team, leads to more robust and sustainable risk assessment, planning and strategies.

Follow this checklist for successful interdisciplinary teamwork in risk management.

DEALING WITH FORESEEABLE AND UNFORESEEABLE RISKS

YES / NO

- ○ ○ A risk assessment is carried out at the beginning of the project.
- ○ ○ All participants give their opinion frankly and are listened to.
- ○ ○ Each organisation and each individual contribute to the risk identification.
- ○ ○ A risk management plan is drawn up which clearly identifies the risks and defines responsibilities for remedying them.
- ○ ○ The risk management plan is accepted by the whole team.
- ○ ○ The risk management plan is made available to all team members.
- ○ ○ To deal with unforeseeable risks, an emergency plan for procedures and coordination is drawn up.

A **no** marks a potential problem in the implementation of the project.

4 DURING THE PROJECT

In this section we cover issues you will have to deal with once your project has started. In particular those related to meetings, worksheets, potential conflicts, on-going evaluation, social media and rela-tions with the press.

4.1 HOW TO RUN A MEETING

Use this checklist to make sure you get the best out of the time available during the meeting.

- Prepare social media content for the meeting to be used by all participants.
- Explain the goals of the meeting at the beginning.
- Follow your agenda according to the priorities. If the participants do not know each other, use an icebreaker technique to get them familiar with each others' names, functions and expectations. Use a visualisation to clarify their professional expertise. (You could use a flipchart or the computer).
- Try to create an atmosphere of "we" and ensure everyone feels part of the team, e.g. by discussing common goals and allocating tasks to all attendees.
- Take a break after 60 minutes at the latest. Use resources available for visually presenting such as flipcharts, pin boards, pictures, videos, or models.
- Insist on respectful behaviour from all participants, even if conflicting positions are expressed.
- Try to involve those who don't speak up.
- Make sure that everyone has their say and is heard.
- Listen, don't talk over people.
- Explain and discuss, don't lecture.
- If possible, keep a record of the outcomes and decisions in the meeting.
- Prepare any trust building activities and join in with them actively. Also consider providing drinks and snacks afterwards.

4.2 WORKSHEETS TO BE USED DURING THE SESSIONS

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 4 Unit 4

STEP 1 IDENTIFY THE MAIN ASPECTS TO BE INCLUDED IN THE WORKSHEET/LOGICAL FRAMEWORK (LOGFRAME)

Putting together a logframe is just one part of a project-planning process for development. A log frame is about first setting your goals and then getting to the grassroots – what you actually need to do. This is done in the form of a table in which you note down what you want to achieve and how you will get there. In theory, writing a logframe should make it easier to plan and manage a project as you can see the sequence in which the actions lead to your overall goal. It shows the logic behind how activities will lead to outputs, which in turn lead to outcomes, and ultimately to the goal. You should use one part of a logframe as a worksheet for a meeting or create your own logframe for a meeting. (Although, this might be too much for one single meeting). However, make sure that all your activities during and beyond meetings fit and correspond to needs of a logframe.

There is no agreed standard for logframes. Some organisations might refer to the goal as an outcome, while others may call it an objective or an impact. For a comparison of terminology between different organisations have a look at the **“Rosetta Stone” of logical frameworks**. However, whatever terminology you choose, the following will explain some of the main aspects to be included in worksheets/logframes:

A standard logframe is divided into four rows, which show your long and short term objectives ranging from top to bottom:

- Goal - overall objective/aim. Ask yourself: what do we intend to do? How does this sit with the project/organisation/region/country strategy, and are they compatible?
- Outcomes/purpose - what will be achieved, who will benefit, and by when?
- Outputs - specific results that the project will generate.
- Activities - what tasks need to be done in order for the output to be achieved? When outlining your activities ask yourself: what can we actually do? What have we already got that we can use to reach the overall goal? Then, what are we missing and what might we need?

These are then achieved and measured by the following headings from left to right:

- Project summary, explaining the objectives. When completing the project summary, it is very important that the links between the different levels of the project are realistic and logical. Activities should logically lead to outputs, which should lead to realistic outcomes, and a sensible goal.
- Objectively verifiable indicators - how you will measure the achievements.
- Means of verification - how you will collect the information for the indicators.
- Risk and assumptions - external conditions needed to get results - essentially means a risk analysis. This is about being prepared for external circumstances and how you'll reduce the severity of those risks. You must budget for this.

An example of a logframe

	Project Summary	Indicators	Means of verification	Risk and assumptions
GOAL				
OUTCOME				
OUTPUTS				
ACTIVITIES				

STEP 2 FOLLOW UP ON ALL ASPECTS

Make sure you follow up on all main aspects included in the worksheet/log frame. If you are the only person in charge within your organisation, make sure that your supervisor is aware of all aspects that need to be followed up. If you are a team member, make sure that roles are clearly distributed with deadlines and guidelines.

4.3 HOW TO SOLVE POTENTIAL CONFLICTS WITHIN THE TEAM

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 2 Unit 3

Remember: project work is teamwork. The project success depends on the quality of the cooperation within the temporary project organisation. However:

- Requirements of the project and requirements of the organisation where participants are employed might be in conflict
- Influence on the human cooperation is little
- The time available to achieve an atmosphere of cooperation is limited

Conflicts can occur on different layers:

- Relations between individuals or organisations
- Key processes for the achievement of project goals
- Work for the achievement of project goals

Any conflicts which occur should be solved as soon as possible. Methods for conflict resolution include:

1. Moderation
2. Mediation
3. Arbitration
4. Arbitration Court
5. Court

The steps for conflict resolution via mediation are:

1. Analysis of conflict situation
2. Detailed analysis of conflict and description of approaches for conflict resolution
3. Decision and execution of conflict resolution

Please check HERITAGE-PRO Module 2 Unit 3 for more information about conflict resolution.

Follow this checklist for successful teamwork in project organisations.

YES / NO	PRECONDITION OR BEHAVIOUR
○ ○	The problems to be resolved (the goals to be achieved) are clearly defined, delimited and accepted by the whole team.
○ ○	The planned contributions of each organisation to the project respect the individual and the organisational capabilities of the partners.
○ ○	Each organisation and each individual have an incentive to contribute to the project goals.
○ ○	The size of the team is appropriate to the problem and ideally not bigger than twelve people.
○ ○	The atmosphere is relaxed and casual.
○ ○	All participants can give their opinion frankly and are listened to.

○ ○ Conversations focus on the factual level of the problem to be solved and/or goals to be achieved.

○ ○ Occurring personal or group conflicts are picked up immediately and resolved separately to the project work.

○ ○ The moderator moderates the team and does not dominate either the activities of the team or any individual.

○ ○ Decisions are made consensually.

○ ○ Results of teamwork are documented and communicated to the whole team for final approval.

A **no** signifies missing preconditions or divergent behaviour and marks a possible source of conflict.

Checklist for additional sources of conflict

YES / NO POSSIBLE SOURCE OF CONFLICT

○ ○ Project definition, the project plan, or contracts with third parties are unclear, contradictory or incomplete.

○ ○ Varying interpretations of project definition, the project plan or contracts with third parties.

○ ○ Modifications of the project.

○ ○ Unpredictable events.

○ ○ Wrong assumption or basis for the project.

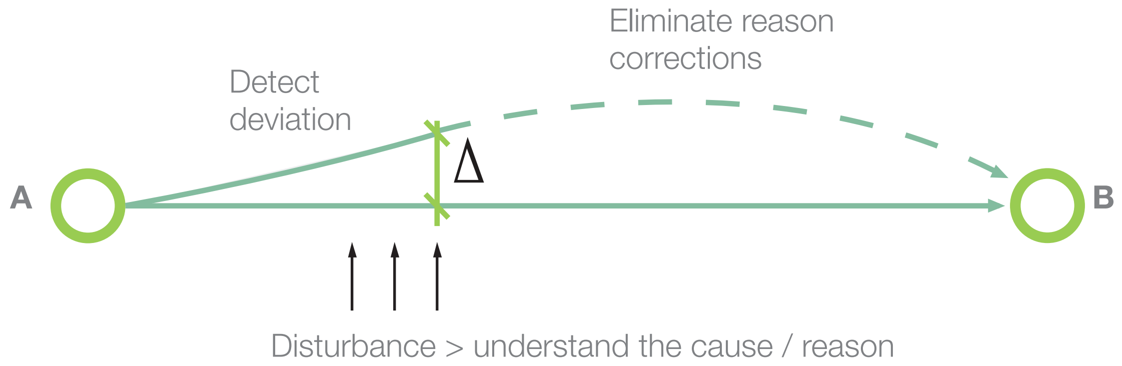
○ ○ Personal ties or antipathies between members of the project team.

A **yes** marks a possible source of conflict.

Checklist for the analysis of different participants

- Interest/target of organisation (e.g. yields, preservation of cultural heritage) or individual (e.g. yields or re-election) in general and concerning the project.
- Capabilities of organisation or individual in general and for the project. (E.g. capability to identify appropriate use for heritage sites, knowledge of local real estate markets.)
- Decision processes and criteria of organisation or individual (e.g. compared to economic criteria, how important are cultural criteria? Compared to cultural criteria, how important are economic criteria?)
- Possible or existing or contribution or role in the project.
- Possible or existing behaviour in the project. (E.g. can and will the organisation adapt to changes caused by the project environment such as remote work rather than face-to-face cooperation.)
- Behaviour/role of person in charge: innovative, know-all, preserver, critic, observer, loquacious, questioner? Helpful links:
  https://www.artsfwd.org/9-team-roles/
  https://sites.google.com/site/b2222w/home/teamwork
- Possible cooperation with other organisations in project team (e.g. organisation A is capable of evaluating ideas of organisation B with marketing know-how. If so, help to implement these ideas.
- Potential for conflict with other organisations in the project team (e.g. organisation A is highly innovative but organisation B is not; organisation B might discredit ideas and results of organisation A; organisation A is responsible for a task but they do not have the necessary capabilities, etc.). (Note: Principal-Agent-Theory helps to avoid (ex-ante) choosing the wrong partner and helps to overcome conflicts of interest (ex-post) through incentive structures).

4.4 HOW TO ADDRESS POTENTIAL DEVIATIONS DURING THE PROJECT/HOW TO STEER



Preconditions:

- The problems to be solved (the goals to be achieved) are defined.
- A system to detect deviations is implemented.

To understand the cause/reason for deviation, you could start with the following:

- Scan through the "Checklist for successful teamwork in project organisations" (above). Are there any "NOs" in the checklist?
- Missing resources? E.g.: "Organisation A promised a certain contribution, but the person with the necessary skills fell ill".
- Competence conflicts? E.g.: "An organisation is responsible for a certain task and they are missing the necessary capabilities or information or do not have the appropriate attitude".
- Conflict of interests? E.g.: "One of the organisations is interested in preservation and the other in yields; an organisation able to synergize these targets is missing".
- Missing incentives? E.g.: "Some or all organisations do not benefit from achieving the project goals".

Elimination of reasons and corrections referring to the examples mentioned above could mean it is necessary to:

- Clearly define delimited project goals to be achieved and make sure they are understood and accepted by the whole team.
- Try to shift the task until the person with the necessary skills is back or prompt "Organisation A" to replace them.
- Change the task distribution within the project or replace partners.
- Hire an external organisation to synergize competing targets.
- Discuss and communicate possible incentives that motivate all organisations to give their best in order to achieve the project goals.

4.5 MEDIA PLANNING DURING THE PROJECT

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 5 Unit 3
HERITAGE-PRO Module 5 Unit 6

This “how-to” guide is a series of steps that will help you plan - in a practical way - a media strategy for the entire duration of your project.

Identify potential multipliers (understood here as all media organisations which could publish your news) and build a media database. In order to do so, you may want to respond to the following questions:

- In which media could I find news similar to that which I might generate?
- Where do I myself go for information about cultural heritage or wider cultural projects?
- Which forms of media are the preferred channels of my target audience? (To identify your audience, see references and exercises about building a persona in Modules 4 and 5 of HERITAGE-PRO training scheme.)

After deciding which media organisations you want to have in your database it is a good idea to classify them by type (online, press, TV, radio, etc.), as you may want to send them different materials based on their nature. Please consider that in a digital era where most media channels appear online, this distinction is not crystal clear and may not always be useful.

Get the contact details of the people in each organisation who write about cultural issues. It is extremely important that information is received by the relevant person and not sent to a general email address such as info@. This is not always easy, but you can start by directly calling the organisation and asking for the name and contact details of the journalist(s) writing or working for the relevant section – or programme in the case of audio-visual media – that your news could be published in.

Your media database will grow over time. However, rather than quantity, quality is what matters here. There is no use in having a huge mailing list; you need to have the right people and try to keep the list updated.

Plan your media contacts according to the milestones of your project. For each milestone think about the following:

- When will I be able to communicate the information and how long in advance do I need to start preparing? Build your plan according to your workload and leave a space for communication.
- In which format(s) can I best communicate this? Try to adapt the formats of your releases to the media based on their nature and what they are able to publish. This does not mean that TV stations should receive videos only, as they are also likely to be posting text in their online platforms. As mentioned above, information is more trans-media than ever before and limits in media typology are blurred. However, an effort to adapt the information and to provide ready-to-use resources is still worthwhile.

Do a media clipping after each media contact. A media clipping is a follow up of where and how your brand or your project has been mentioned on the news. It is very useful to see which media organisations are interested in your content, as you can start building closer relations with them (e.g. by proposing exclusive interviews, etc.). A media clipping is a report containing records of all the times your project was featured in press – whether it be newspapers, magazines, television or online media. While this is offered as a paid service for big projects with extensive media coverage, it can also be done in-house by proactively searching the news using internet browsers and taking advantage of online media alert systems.

You may also consider a media partnership for your project. This means that you suggest to one media organisation that they accompany the whole project, e.g. by getting exclusive information, interviews, background information, and context data. Usually, the local media are interested in this kind of partnership, but you might also hire a social media blogger to take on this role. This way you can manage a continuous flow of information to the public, while the media partner has the guarantee of getting first hand content.

4.6 HOW TO WRITE A PRESS RELEASE

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 5 Unit 2
HERITAGE-PRO Module 5 Unit 3

Before writing a press note, you must be clear about the subject and why you want to send it.

A press release should be no longer than two pages. In that space you should summarize your news, back it up with verifiable facts or figures, include a statement and leave your contact details.

Put yourself in the reader's shoes and imagine that you find that news in the newspaper or in the digital media, and ask yourself if you would read it.

Be brief, concrete and attractive.

Be direct, do not fill in gaps with redundant information, forget about texts with rhymes or language that is inaccessible to the journalist. When you write a story, don't be concerned about showing off your writing skills - use a direct tone and no linguistic algorithms.

STEP 1 HEADER

The head of the note is extremely important as it's the ticket to either being read or ending up in the trash!

If you have a company or an institution motto or a slogan you can also include it.

Identify the document with the title, PRESS RELEASE. Include the sending date.

Should you include any photography? It depends on what you consider more appropriate. You can include an attractive image in the header. Remember that, "a picture is worth a thousand words".

STEP 2 HEADLINE

This is possibly the most complicated point. How can you summarize your story in one sentence and make it attractive enough that it will hook the journalist?

The first paragraph of the body of text should link directly to the headline without repeating the same sentence. The idea is to summarize the content that will be developed next.

What's really important about the story you're sending out? That's what should be the headline!

Recommendations for writing a good headline:

- Don't rhyme.
- Don't use riddles or simple jokes.
- Round up any numbers.
- Try not to include your brand name.
- Don't use more than 10 words and write it in 2 lines. If you use more words or write it in 3 lines that's fine, but not as eye-catching.
- Highlight the headline with a special font, a larger size or in bold.

STEP 3 TEXT LEAD

This is the first paragraph of the press release. In four or five lines, it needs to contain the most important information. The journalist should be able to know whether your press release is newsworthy of not just by reading this.

The style of the entry is usually bold.

In journalism, the rule of the five Ws is used:

- What: What happened? What's the story? What's going on?
- Who: Who is involved? What institution? What individuals?
- When: When did it happen? When will it happen?
- Where: Where did it happen or where is it going to happen?
- Why: Why does the reader care?

These are the five classic questions, but two more could be added to this list:

- How?
- For whom?

If you answer these questions, you'll be able to set the priorities of your release. However, it isn't mandatory to answer all the Ws in the entry. Select the most important ones (as few as two or three, or maybe even just one) and develop them into one paragraph.

Follow this outline to build the entry:

- Answer each question on a sheet of paper.
- Number it according to its importance.
- Write the entry using the most significant Ws.
- Then, detail the rest of the Ws in the body of the information, in the order you have established.

STEP 4 BODY TEXT

The exercise of giving priority to the Ws is what is known in journalism as "the inverted pyramid". It is about giving a logical order to the content. The idea is to start with the most relevant information, develop it in more detail, and go down your pyramid to the least important.

The base of the pyramid is the beginning of the news, so you should look for data that covers the content, or figures that can be contrasted. The idea is to argue and expose the relevance that each W has.

Include quotes, especially if they are statements from important people in the sector or from a person with a high position in the institution. In this way you will add a human element to what you are saying and express closeness to the medium and the reader. But make sure that the quote emphasizes the core idea of the news.

Always include a link to the data sources. Without having numbers or evidence in front of them, there is no reason for people to believe what you say.

In short, one idea = one paragraph, and the ideas should go from the most important to the least.

STEP 5 BOILER PLATE

Summarize in a maximum of 10 lines of text brief information about your institution. This serves as a small biography about your entity: the activity you're involved in, when it was set up, and what makes you unique This is the place to put out your marketing message.

STEP 6 CONTACT DETAILS

Remember, this is essential if they're interested in publishing and need more information from you!

- Name and surname
- Position
- Email address
- Telephone number
- Website

STEP 7 ADDITIONAL MATERIAL

Attach photos, links to your institution's videos or dossiers with more information. This should be quality material that will make the task easier for the journalist.

STEP 8 LAYOUT

For the journalist the most important thing is the content. But, as with everything in life, image matters a great deal.

Design must never tarnish the content; it should act as an incentive to encourage reading -elegant but not overdone. As a general rule less is more, but always take care of the details, too.

4.7 TEMPLATE FOR A PRESS RELEASE

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 5 Unit 2
HERITAGE-PRO Module 5 Unit 3

This template is focused on the format of the press release. It is a genuine example that will make your task easier. For specific guidance on the content, see "How to write a press release" in section 4.6 of this toolkit.

HEADER

A new interdisciplinary training scheme for cultural heritage managers is now available.

HEADLINE

A new training scheme for cultural heritage professionals puts interdisciplinarity working into focus. Developed by a team of six public and private European institutions, networks, development agencies and associations in the framework of the Erasmus+ HERITAGE-PRO project, the training includes content on global challenges and opportunities in the field of cultural heritage, efficient teamworking and interdisciplinary conflict resolution; valorisation of cultural heritage; participation, and effective communication.

TEXT LEAD

An interdisciplinary capacity-building training scheme for cultural heritage managers has been developed in the framework of the Erasmus+ project HERITAGE-PRO. The new training scheme aims at training cultural heritage managers in understanding the different mindsets and expectations of actors in the preservation of cultural heritage in Europe.

BODY TEXT

The training scheme consists of five modules: dealing with the topics of global challenges and opportunities in the field of cultural heritage; efficient team working and effective interdisciplinary conflict resolution; valorisation of cultural heritage; participation, and effective communication in an interdisciplinary environment.

The process leading to the elaboration and publication of these modules was a long and collaborative one, involving project partners but also experts in the field who tested the preliminary materials. The modules are available online in open access in English and German. Translated versions in Spanish will also be available soon.

BOILER PLATE

HERITAGE-PRO – Interdisciplinary Training for Professionals of Different Disciplines Towards Sustainable Management and Preservation of Cultural Heritage is a transnational initiative and is supported by the European ERASMUS+ funding scheme 2018-2021. The consortium – made of six European partners from Germany, Spain, Austria, Sweden and a European network – strives to answer the continuing call for interdisciplinary training for professionals of different disciplines who are working towards sustainable management and preservation of cultural heritage.

CONTACT

Name & surname

Project coordinator

Email: name@company.com

Phone number

*Note: put your logo in the header of the press note. As well as putting your logo in the header, you can also include a footer. This is especially recommended when the press release is submitted on behalf of more than one project partner.

4.8 SOCIAL MEDIA PLANNING DURING THE PROJECT

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 5 Unit 6

Choose the social media platforms that best suit your communication purpose, formats and target audience. (See Module 5 of Heritage-PRO to learn more about the characteristics of different social media platforms).

Build a social media content plan where you can foresee:

- Time planning: date of the posting(s)
- The subject of the posting
- A link
- An image/video (yes/no)
- Posting responsibility
- The deadline for the information
- Social media platforms on which specific content will be posted

Try to engage in on-going campaigns (e.g. using the corresponding hashtags and/or following the specific guidelines by the campaign promoter). Identifying “world days” that relate to your area of work is a good practice which allows you to plan your engagement with campaigns around those world days.

Rely on multipliers. In your network, who is active on social media and has built a significant community? Can you ask for help to spread the word about a specific event, publication or activity?

Create dissemination packages or “cheat sheets” to provide stakeholders (i.e. your organization’s board members) with ready-to-use materials that they can use to disseminate your work.

4.9 EXAMPLES OF SOCIAL MEDIA CONTENT

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 5 Unit 6

Here we illustrate a real example of social media content. This is a typical tweet of 272 characters. (Twitter limits each post to 280 characters in English.) However, this can be adapted to different social media platforms. Facebook, for instance, allows much longer posts.

Main text of the post. Try to keep it simple and straight to the point. Use direct formulas that stimulate conversation. Getting the audience’s (positive) reaction is the definitive thing we want to achieve in social media. Remember to insert **hashtags** in your phrasing. You can also use additional hashtags at the end of your message. Keep posts short and provide a **link** for further information.

Have you ever thought about how to achieve interdisciplinary sustainability in #culturalheritage preservation activities? Get inspired by many good practices in Module 2 Unit 5 of the Heritage-Pro Training scheme #heritagepro_project #EuropeforCulture #ErasmusPlus https://heritage-pro.eu/training-module/

Visuals are always encouraged, as they get higher engagement than text-only posts. Social media "postcards" or self-explanatory images combining image and text are a good idea to make your posts more attractive.

Consider that most social media offer link previews, which in a way function as an image or audiovisual element. For instance, if you link to a YouTube video, you'll probably like to have the preview of the video so that people can directly click on the frame to play the video – in this case, you don't need to (and shouldn't) include an extra picture, as it would eclipse the video.

5 AFTER THE PROJECT

In this section we cover issues you will have to deal with once your project is finished. In particular those related to a follow-up plan, a final evaluation of the project, media and social media.

5.1 HOW TO MAKE A FOLLOW-UP PLAN

Please be aware that to make a more efficient follow-up plan, we recommend you partially design it at the beginning of the project, just before you organise the round-table meeting.

STEP 1 CREATE A FOLLOW-UP ROADMAP FOR YOURSELF AND YOUR TEAM

Prior to the round-table discussion, think about and identify topics and questions – a "roadmap" document – that you would like to use to follow up after meeting with project members. Identify:

- Why will you need to follow up on a certain topic/question?
- How will you follow up? Which methodologies (per topic, per organisation, per budget, per partner, etc.) and tools (e.g. some of the professional online tools like Less Meeting, Google Task, Asana, etc.) - if any – are you going to use to follow up? (This might help you to structure some discussions in the round-table meeting).
- With whom are you going to follow up? Do you need to follow up with all participants on all questions or only with some of them on certain questions?

After the round-table discussion, add additional topics/questions to the "roadmap document" that have arisen from the meeting, answering the same points as for the ones identified prior the round-table discussion, listed above.

STEP2 SEND A FOLLOW-UP EMAIL

Write to all participants of the round-table discussion to thank them for their participation and include the main points raised, as well as those concluded and those which are pending. Attach the minutes from the meeting.

5.2 FINAL EVALUATION OF THE PROJECT

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 4 Unit 4

Please be aware that in order to achieve better results, we recommend partially preparing the evaluation proposed here before the start of the project.

In general, evaluation processes go through four phases: planning, implementation, completion and reporting. While these reflect common development steps, it is important to remember that your evaluation efforts may not always be linear, depending on where you are in your programme or intervention. In order to be able to carry out evaluations at different stages (e.g. an intermediate evaluation and a post-project evaluation), you need to know what/which data to follow/collect during the implementation, which monitoring instrument is to be set at the beginning of the project from a logical frame, and who is in charge of monitoring/collecting data. You need to set internal evaluation and a monitoring template, but, depending on the structure, activities, stakeholders and participants in your project, you might have the opportunity to get direct feedback and evaluation from some stakeholders and participants.

Lessons learned from an intermediate evaluation could help you to adjust certain activities during the implementation of your project, while post-project evaluation could help you to improve and set some things differently from the beginning of your next project.

STEP 1 DEVELOP AN EVALUATION AND MONITORING TEMPLATE

Align an evaluation and monitoring template with main elements (e.g. logframe) set at the beginning of the project. The following elements should be identified in the template:

- Indicator – the first and most important step is to decide which indicators you will use to measure the success of your project. You need to choose indicators for each level of the evaluation of your project – outputs, outcomes and goals. There can be more than one indicator for each level, although you should try to keep the total number of indicators manageable. Each indicator should be:
  - directly related to the output, outcome or goal listed in the logframe;
  - something that you can measure precisely using either qualitative or quantitative methods and your available resources;
  - if possible, a standard indicator that is commonly used for your type of the project. For example, UNESCO Culture|2030 Indicators give thematic indicators for culture in the 2030 Agenda. Using standard indicators can sometimes be easier because they are already well defined, there are tools available to measure them, and you will be able to compare your results to other projects or national statistics.
- Definition: how it is calculated
- Baseline value: what is the current value? Before you start your project, you need to measure the starting value of each indicator. This is called the “baseline”.
- Target value: what is the target value?
- Data sources: how will it be measured?
- Frequency: how often will it be measured?
- Responsibility: who will measure it? Decide who will be responsible for measuring each indicator. Output indicators are often measured by field staff or program managers, while outcome and goal indicators may be measured by evaluation consultants or even national agencies.

- Reporting: where will it be reported? This could be in your monthly program reports, annual donor reports, EU programmes reports, on your website, etc. Indicator results are used to assess whether the project is working or not, so it is very important that decision makers and stakeholders (not just the donor) have access to them as soon as possible.

An example of an evaluation and monitoring template:

	Indicator	Definition	Baseline value	Target value	Data source	Frequency
GOAL						
OUTCOME						
OUTPUTS						

Note: In the case that your project is funded by a specific fund/programme such as EU programmes or national funds, be sure to include indicators requested by that specific fund/programme in your evaluation template. Most likely, the contracting authority of the fund/programme will expect the project to fulfil certain indicators and reach certain target values.

STEP 2 DEVELOP AN EVALUATION QUESTIONNAIRE FOR THE PARTICIPANTS OF THE PROJECT

Your interdisciplinary preservation project will include different stakeholders and participants. So, you might ask them for an evaluation of the project and its activities.

For this, you will have to develop specific questionnaires addressing particular issues that you are interested in. Your evaluation questionnaire will depend on aspects that you would like to evaluate. For example, if you would like to evaluate a social/economic/environmental impact of a adaptive re-use project, you might ask residents, community members, service users, etc. about the following:

- What activities/opportunities does this place offer you? What do you mainly do here?
- How did this place make you feel before renovation?
- This place has been recently renovated. How do you like the change?
- How important is it to you that this renovation strives to be resource efficient and reduce waste?
- How important it is to you that this renovation strives to create jobs?
- When taking into consideration cultural heritage in general, who should, in your opinion, take responsibility for keeping cultural heritage alive?
- In your opinion, who should take responsibility for making the cultural heritage environmentally friendly (e.g. by minimising waste)?
- Would you recommend this place to entrepreneurs looking for a place to set up a business?
- Are you willing to support this place financially, either by making donations or taking part in a crowd funding campaign?

Participatory processes and models are crucial for project planning and development. There is more about them in Module 4.

5.3 EXAMPLE OF A PRESS RELEASE TO INFORM THE MEDIA ABOUT THE COMPLETION OF THE PROJECT

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 5 Unit 2
HERITAGE-PRO Module 5 Unit 3

The press release is composed of a header, a headline, a text lead, a text body, a boiler plate and contact details, as shown in the following example. We strongly encourage you to include images to illustrate the content.

HEADER

The *Burgenblogger* project: ten years telling the stories of the Upper Middle Rhine Valley, a UNESCO World Heritage Site

HEADLINE

Since the launch of the project ten years ago, seventeen different individuals, undertaking the role of *Burgenbloggers* have travelled across the UNESCO World Heritage Site of the Upper Middle Rhine Valley and shared their experience via social media, helping to build a strong community around cultural heritage.

TEXT LEAD

Project partners (list them all here, or in a footnote if the list is too long and will distract the reader) expressed their satisfaction with the impact of the project in terms of community building around shared cultural heritage, and said that the long-term impact will be monitored and results will be made public so that others can be inspired by this experience. The *Burgenblogger* will continue as a new spin-off project which will be announced by the partner institutions very soon.

BODY TEXT

The first *Burgenblogger* did her first term from May till October 2015. For half a year, she lived in the tower room of the Sooneck Castle, built in the 11th century, close to Niederheimbach, a municipality on the Western side of the valley. There, she reported on the people and the culture along the Middle Rhine Valley. While travelling around the UNESCO World Heritage Site, and observing its people and its history, the blogger cast a different view on the by seeking out special things in ordinary places.

Her assignment, and those of her successors, was to let herself drift, travelling across the valley and its land with open eyes and an open mind in order to find out what it means to live, to love, to be at odds and to grow up in the Middle Rhine Valley. One of the most notable things the bloggers did was to listen. What each one heard was transmitted through different channels of social media - even beyond the borders of the valley. These different platforms allowed the castle blogger to be in constant contact with readers and the public.

BOILER PLATE

Burgenblogger is a project developed by the General Directorate for Cultural Heritage in the Rhineland Palatinate (GDKE); the Rhein-Zeitung, a regional newspaper from Koblenz, and the Entwicklungs-agentur Rheinland-Pfalz (EA), a state-owned non-profit organisation responsible for regional development. The aims of the project were to examine the opportunities and problems of the this UNESCO World Heritage Site and to tell the story of its citizens and their culture.

CONTACT

Name
Position
E-mail
Phone number

Picture: Sooneck Castle (CR: Entwicklungsagentur Rheinland-Pfalz e.V.)

5.4 TIPS TO MAINTAIN AN ACTIVE SOCIAL MEDIA PRESENCE AFTER THE PROJECT

THE FOLLOWING CONTENT REFERS TO:
HERITAGE-PRO Module 5 Unit 6

It is important to maintain an active presence on social media beyond the completion of the project. Otherwise, any communication efforts done during the project could be lost. If you succeed in maintaining a regular communication flow, you can build upon it and continue to increase your networks.

Some general tips to maintain an active presence in social media beyond completion of your project:

- Build a social media content plan (see section 4.8 of this training kit) that goes beyond the completion of the project. It is a good idea to prepare as much content and as many materials as is possible in advance.
- Define responsibilities: who is going to be in charge of posting? Who will reply to mentions and direct messages? If a rotating system is designed, who will monitor it?

Be realistic about what can be done, the human resources available and the content that can be generated out of the project, in (in)direct relation to it, and for how long.

6 THE HERITAGE-PRO PARTNERS: AN INTERDISCIPLINARY TEAM FOR SKILLS DEVELOPMENT IN CULTURAL HERITAGE PRESERVATION

HERITAGE-PRO is an Erasmus+ initiative of six European partners from five countries who strive to answer to the continuing call for interdisciplinary training for professionals of different disciplines towards sustainable management and preservation of cultural heritage.

The **HERITAGE-PRO** website https://heritage-pro.eu/ provides you with further information and updates. Please feel free to browse through the pages and benefit from information and training material alike.

HERITAGE-PRO is implemented by a partnership of six European institutions, companies and networks from Germany, Spain, Austria, Sweden and Belgium, all of which are active in vocational training for the preservation of cultural heritage. These institutions have cooperatively developed this vocational training scheme, which closes the gap of interdisciplinary training in the field.

- **Kultur und Arbeit e.V. – Bad Mergentheim / Germany (Coordinator)**
  www.kultur-und-arbeit.de
- **Restrade – Höganäs – Sweden**
  www.restrade.se
- **Asociación Española de Gestores de Patrimonio Cultural (AEGPC) – Madrid / Spain**
  www.aegpc.org
- **European Network on Cultural Management and Policy (ENCATC) – Brussels / Belgium**
  www.encatc.org
- **Institut für immobilienwirtschaftliche Forschung (IPRE) – Vienna / Austria**
  www.ipre.at
- **Entwicklungsagentur Rheinland-Pfalz – Mainz / Germany**
  https://ea-rlp.de/

7 ACKNOWLEDGEMENTS

The **HERITAGE-PRO** team is very proud that the following European experts have accepted the invitation to the Advisory Board of the project. They and their institutions are associated partners to the project.

More information on their work, achievements, and ambitions can be found here.

Germany

- Mrs **Patricia Alberth**, head of the World Heritage Office of the City of Bamberg
- Mr **Thomas Metz**, director of the General Directorate for Cultural Heritage of Rhineland-Palatinate
- Mr **Frank Sprenger**, head of the Centre for Conservation and Monument Conservation of the Koblenz Chamber of Crafts
- Mr **Titus Kockel**, PhD, head of Unit Promotion of the Trades, German Confederation of Skilled Crafts and Small Businesses

France

- Ms **Claire Giraud Labalte**, heritage expert, art historian and professor emeritus, member of ENCATC / Alliance 3.3, president of Le Pôle du patrimoine en Pays de la Loire and president of the association Territoires imaginaires

Sweden

- Ms **Rebecka Nolmard**, director-general, Swedish Ministry of Culture
- Mr **Gunnar Almevik**, PhD, professor at Gothenburg University, Department of Conservation

Spain

- Mr **Carlos Romero Moragas**, archaeologist and cultural manager, head of the Centre for Training and Dissemination at the Andalusian Institute of Historic Heritage (IAPH) in Seville
- Mr **Gabriel Morate Martin**, director of the Spanish Historic Heritage Preservation Program at MonteMadrid Foundation, member of the Executive Board of Hispania Nostra and the Spanish Association of the Friends of the Castles (Head of the Technical Department), editor of the "Monumentos Restaurados" (Restored Monuments) publication series

Norway

- Dr. Mr **Terje M. Nypan**, technical director at Riksantikvaren (Norwegian Directorate for Cultural Heritage)