

ORGANIZING, PROMOTING AND ENABLING HERITAGE REUSE THROUGH INCLUSION. ACCESS, GOVERNANCE AND EMPOWERMENT

Deliverable 4.1

Detailed Workplan for WP4

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Project Full title		Organizing, Promoting and Enabling Heritage Re-use through Inclusion, Technology, Access, Governance and Empowerment	
Project Acronym		OpenHeritage	
Grant Agreement No.		776766	
Coordinator		Metropolitan Research Institute (MRI)	
Project start date and duration		June 2018 – Mai 2021 (48months)	
Project website		www.openheritage.eu	
Deliverable Nr.	D1.1	Planned delivery date	August 2018
Deliverable title	Detailed workplan for WP4	Actual delivery date	September 2018
Work Package No		4	
Work Package Title		Cooperative Heritage Labs	
Responsible		MRI	
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Reviewer(s) (if applicable)			
Status:		Final (F)	F
		Draft (D)	
		Revised draft (RV)	
Dissemination level:		Public (PU)	PU
		Confidential, only for members of the consortium (CO)	

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1. WP goals, tasks and timeline

Work package	4				Lead beneficiary								MRI			
Work package title	Cooperative Heritage Labs															
Participant number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Short name of participant	MRI	EUTROPIAN	UGENT	UNEW	UBER	OW SARP	ICLEI	EURODITE	STIFTUNG TRIAS	UNIROMA3	CENTER FOR URBAN HIST.	LUISS	PLATONIQ	CEU	CML	TWBPT
Person months per participant	20	3	17	20	4	30	2	8	30	3	2	30	12	30	30	10
Role in the WP	WP and Task lead		Task lead			Task lead			Task lead					Task lead		
Start month	1									End month	48					

Goals and tasks

The work package concentrates on setting up, managing and evaluating the six Cooperative Heritage Labs (CHLs). These CHLs function as unique places to bring theoretical background, innovation, co-creation, practical implementation and evaluation together, offering an opportunity to develop and validate the inclusive model of adaptive heritage re-use. CHLs will also be used to validate the toolbox developed by OpenHeritage in WP5.

Task 4.1. Management of Cooperative Heritage Labs (M1-M48):

The task has the aim to oversee the entire period of operation, and manage the CHLs' particular phases: the set-up, the first year, mid-term evaluation, the second year and the final evaluation period. It lasts for the entire duration of the project (M1-M48). The actual work in the CHLs will start from M12 onwards, with the acceptance of the first Local Action Plans.

Set-up (M1-M12): Adopt a site and problem appropriate methodology to carry out the CHLs' inclusive management model, with organizing the first stakeholder panels and starting the community involvement programs. The phase ends with the submission of the first (draft) Local Action Plans (LAPs) for each CHL.

First year (M13-M23): the testing of the inclusive model begins with site appropriate programmes. This phase will be more experimental, a learning process of how the inclusive approach of OpenHeritage works, also facilitating the incorporation of some of the models/methods studied in WP2 on the Observatory Cases.

Mid-term Evaluation (M24): Based on the experience of the first year, the feed-back from the Task Force, the interim results of WP2 (OCs) and WP5 (Toolbox development) the creation of a revised, more exhaustive LAP for each CHL.

Second year (M25-M36): Implementation of the revised LAP.

Final evaluation (M37-M48): The final evaluation will concentrate on summarizing the diverse CHL experiences, provide feedback on the toolbox and create the blueprint of the inclusive heritage management model that is transferable to other locations.

Task 4.2: Community and multi-stakeholder partnership development (M13-M36)

Work here will determine how the aspect of community development and multi-stakeholder management get represented in the LAPs. This Task will have a special significance in the CHLs of Pomáz, Sunderland and Centocelle. Although separate, this is a “subsidiary” task to Task 4.1 in a sense that a close cooperation between the two is envisioned. Task 4.2’s contributions will provide vital input to how the inclusive governance model of the CHLs takes shape. Contributions from this task will not form a separate deliverable, but will be part of deliverables produced in Task4.1.

Task 4.3: Management of innovative financial and business solutions (M13-M36)

Task 4.3 makes sure that CHLs adapt innovative business and financial solutions. Work in Task 4.3 will shape the LAPs from the business and financial aspects. Task 4.3 will have a special significance in the CHLs of Hof Prädikow, Lisbon, Centocelle and the Praga neighbourhood of Warsaw

Task 4.4: Regional integration and territorial management of Cooperative Heritage Labs (M13-M36)

Corresponding to the third aspect of the inclusive management model that regards regional integration, Task 4.4 will contribute to the deliverables of Task 4.1. Task 4.4 will have a special significance for Sunderland and Pomáz.

Task 4.5: Management of Task Force (M13-M36)

Overseeing the work of the Task Force that provide peer- to-peer reviews for the six CHLs in the course of their operation. The Task Force consists of project partners and Advisory Board members with specialized knowledge. For the 6 review sessions – lasting 2 days each – a methodological guidance will be produced that will be reviewed as part of the evaluation process.

Deliverable timeline

D4.1: Detailed workplan of WP4. It refines and summarizes the work to be conducted in WP4, and it will serve as a guideline for the WP leader and the participants. The deliverable is linked to Task 4.1

D4.2: Local Action Plans of the Cooperative Heritage Labs. The deliverable consist of six separate reports that lay down the foundations of the work to be done in the framework of the Cooperative Heritage Labs, and in each case it attempts to draw a preliminary model of inclusive heritage management. The deliverable is linked to Task 4.1, thus the lead beneficiary is MRI. However, the individual reports are prepared by the partners responsible for the Cooperative Heritage Labs.

D4.3: Interim progress reports and updated Local Action Plans. The structured report will create a summary of progress about the Cooperative Heritage Labs (CHLs), focusing both on a general level

and on a CHL level. The first will focus on creating an overview, whereas the second will detail per CHL the good practices, problems and changes to be carried out, and create an updated and more complex LAP for each CHL. The deliverable is linked to Task 4.1. The individual reports are prepared by the partners responsible for the CHLs, whereas the overall summary is the responsibility of MRI.

D4.4: Evaluation report on the Task Force. The deliverable is a brief summary on the methodological lessons learned from the employment of the Task Force with an adaptable blueprint for its widespread use. The deliverable is linked to Task 4.5.

D4.5: Evaluation report on the Cooperative Heritage Labs: This final deliverable not only provides a detailed evaluation of all CHLs but finalizes the inclusive management model that OpenHeritage has worked on, creating an adaptable blueprint for its application, offering solutions for diverse policy and economic environments. It is linked Task 4.1, and is key deliverable.

Deliverable	Lead beneficiary	Due date
D4.1: Detailed workplan of WP4	MRI	M3
D4.2: Local Action Plans of the Cooperative Heritage Labs	MRI	M12
D4.3: Interim progress reports and updated Action Plans	MRI	M24
D4.4: Evaluation report on the Task Force	CEU	M36
D4.5: Evaluation report on the Cooperative Heritage Labs	MRI	M48

For full timeline see Section 5.

Relevant milestones

Milestone	Lead beneficiary	Due date	Means of verification
Cooperative Heritage Labs begin to operate	MRI	12	The draft Local Action Plans (LAPs) for CHLs are ready, testing of inclusive model begins in the 6 CHLs
Mid-term review	MRI	24	Interim Progress Report submitted to EC (M18); WP1 finishes; Observatory Case analysis finishes ; National and European dissemination intensifies
36-month review	MRI	36	By M6 WP2 finishes, the evaluations of CHLs begin. The milestone also includes an overview of project activities so far.
Final report	MRI	48	Final report is submitted containing contributions from all partners. It includes the synthesis of findings and policy recommendations, the inclusive model and a toolbox validated by partners

2. Partners' responsibilities

According to the Section 4.1 of the Consortium Agreement:

- Each Party undertakes to take part in the efficient implementation of the Project, and to cooperate, perform and fulfil, promptly and on time, all of its obligations under the Grant Agreement and this Consortium Agreement.
- Each Party undertakes to notify promptly, in accordance with the governance structure of the Project, any significant information, fact, problem or delay likely to affect the Project.
- Each Party shall promptly provide all information reasonably required by a Consortium Body or by the Coordinator to carry out its tasks.
- Each Party shall take reasonable measures to ensure the accuracy of any information or materials it supplies to the other Parties.

The special roles of WP leaders, task leaders and other partners involved in WP4 include the following:

WP leader's role:

MRI is the Work Package 4 Leader and oversees that the work is performed timely and at a high-quality level. Its most important tasks are:

- to coordinate the work (communication, quality, keeping deadlines etc.) among the partners involved in WP4 (especially CHL operators and partners involved in Task 4.2 , 4.3 and 4.4);
- to monitor that WP outputs are coherent and contribute to achieving WP and project objectives;
- to cooperate with other work package partners develops templates for internal deliverables and Local Action Plans;
- to review the timelines, work plans and other documents prepared by CHL operators, task leaders and other contributing partners;
- to visit the sites if necessary;
- to facilitate internal communication among the CHL operators;
- to work towards harmonizing WP4 activities with the results of WP2, WP5 and WP6;
- to oversee risk management.

Task leaders' role:

- to prepare a work plan for their tasks with the aim of providing input for the CHLs;
- to develop working papers which facilitates the adaptation of innovative techniques/models/structures in the CHLs;
- to provide quality assurance for deliverables;
- to support the progress of applying innovative methods in the CHLs (each task leader in its own field);
- to communicate with the task partners and WP leader;

CHL operators' role

- to operate of Cooperative Heritage Labs;
- to prepare and implementation of LAPs;
- to communicate with all project partners in order to channel all the inputs from the professionally diverse and experienced team;
- to cooperate with the leaders of Tasks 4.2, 4.3, 4.4;
- to develop interim reports submitted to the WP leader.

3. Communication

- The main communication channels and communication strategies are described in Deliverable 6.1 “Dissemination and Knowledge Sharing Strategy” (developed by ICLEI).
- Communication within the WP will be conducted primarily via emails and online meetings (e.g. Skype)
- CHL operators are responsible for the local communication of their activities, each of the LAPs will have a Communication section.
- Once CHLs start the implementation of their LAPs in M13, their activities will play a significant role in the project communication. So regular communication between the CHL operators, Project coordinator (MRI) and ICLEI will be important.

4. WP risks and mitigation actions

The key risks and related to the WP implementation and their appropriate mitigation measures are listed in deliverable 7.1. The following is just a list of the most significant Lab related risks.

Risk type	Description	Planned mitigation actions
Operation-related	Lack of community interest	Open approach to getting people involved from early on Offering different ways of engagement for the community Organising programs that target different audiences
	Bad physical state of the site	Trying to secure outside sources to improve it
	The ownership of the site changes – new/old owner loses interest	Entering into negotiations with the owner Preparation of different options that could be attractive Constant risk monitoring
	Missing competence of the project implementer in some	Use of the project consortium's knowledge and expertise

	areas relevant for the project implementation	Relying on the local community's expertise
	Lack of interest of local stakeholders	Activation of informal connections to reach them Development of a plan to offer them something rewarding
	Lack of users of the Heritage Points	Careful monitoring of the webpage use, modification of certain functionalities accordingly, simplification if required
Professional	Criticism among the heritage professionals due to the new approaches proposed by the CHLs	Use of scientific and other fora to persuade them Organisation of tours, workshops, etc. in the CHLs
Political - regulatory	Lack of/volatile support from the local administration	Strong relationship building with NGOs and other, non-political stakeholders
	Regulation changes limit the realization of the project activities	Flexible reaction – assessing the impact of the regulations, creating a modification of the Local Action Plan
Sustainability	Lack of human resources to run the heritage site on the long run	Focus on the development of sustainable solutions as the CHLs
	Lack of financing	Developing solutions during project run for self-sustaining finances (Not necessarily applicable for all CHLs)
	Increasing commercial push endangering the original goals	Negotiating with the investors, while relying on local NGO and community support
Enterprises/entrepreneurs	Finding appropriate enterprises/entrepreneurs with interest in the heritage area	Early start in analyzing possible partners Use of local networks to reach out Focusing on understanding their needs
	Getting good/reliable market information in order to determine the feasibility of certain market-oriented functions or other programmes for the CHL	Building relations with local communities, entrepreneurs, chambers of commerce, etc. in order to get 'direct' information on local markets

5. Connections to other WPs

WP4 will be carried out in strong collaboration with all WPs. Continuous dialogue between the WPs is essential for achieving smooth project implementation and providing good outputs by the end of the project.

- Collaboration with WP1 in the early phase of the project is needed to understand the reuse processes and help the data collected in WP1. Also, CHLs will benefit from the knowledge produced in WP1 early on their process.
- CHL operators and MRI will provide input from WP4's side to a combined survey, conducted by WP1 and WP2, focusing on the main challenges CHLs will likely to face during the implementation of their work. In M13, WP2 findings will be provided to CHLs and will be incorporated in the LAPs.
- The toolbox developed by WP5 will be used and tested in the CHLs, and will be finalized based on this experience.
- The majority of WP6 (dissemination) activities will be carried out in close collaboration or directly by local partners managing CHLs
- CHLs will benefit from the evaluations developed under WP3, and the findings of WP3 will also contribute to D4.5, the *Evaluation report on Cooperative Heritage Labs*, which is a key deliverable.

6. Activities and Timeline

The following section outlines in more detail the necessary activities CHLs should undertake in the course of the project. It is designed to make sure that (1) the various CHLs, with different strengths will all be able to deliver the project related promises and develop their currently less prominent aspects; (2) that the necessary local outreach and capacity building activities are done. Shorter reports and interim deliverables were created for internal use only. Internal deliverables will serve the double purpose of guiding the work done in the CHL, but also provide a way to channel the project partners' diverse knowledge and expertise to the individual CHLs.

Set-up (M1-M12)

The first 12 months is the preparatory period, designated to adopt a site and problem appropriate methodology for each CHL to carry out the work, and create a Local Action Plan at the end. This time is also dedicated to mapping the current status of the CHL sites, identifying possible changes that occurred since the preparation of the proposal (state of the site and accessibility, ownership changes, scope of use, economic-political environment, etc.) and to create a plan for the involvement of the local community and stakeholders.

To achieve this:

- An "Overview of the current status" should be written. It is a brief document, describing the CHL sites, focusing on identifying the main strengths and weaknesses of the specific sites. As part of the work it should include the first overview of the possible ways of community involvement (including crowdsourcing and crowdfunding), ideas about applicable financial

instruments supporting sustainable operation, and ideas about how the Heritage Points could support most efficiently the operation of individual CHLs during and after the project. Aside from improving existing good practices and solutions, in this deliverable efforts must also be mentioned to overcome possible weaknesses and deficiencies. A draft template for this document will be provided by MRI by the end of September, and discussed and finalized in cooperation with all CHL partners.

- To make sure that the local communities/stakeholders needs and expectations are included in the Local Action Plans, a number of meetings should be organised in the preparatory period. To facilitate this, a 2-3 page long document will be prepared to plan the timing and organisation of these meetings.
- The “Report on stakeholder and community involvement programmes”, a 5-10 page document prepared by each CHL, will summarize the main conclusions and outcomes of the events regarding the objectives and scope, the operation, and the community’s role in the sites’ operation.

All these activities will contribute to the development of well-established, feasible and realistic Local Action Plans, which will essentially guide the work in the six CHLs in the first year.

As part of the collaboration with the other WPs, during this period both MRI as the WP lead and the CHL will provide contributions to the survey conducted by WP1 and WP2 about the main challenges they will likely to face during the implementation of the CHLs. These challenges include regulatory, policy, social, environmental, economic, etc. issues. This survey will provide information to be fed into WP2 and help focus the OC case studies on the most important issues that CHLs face.

The template for Local Action Plans will be drafted together by MRI and all CHL partners, using the experience of the first few months of working in the CHLs. The templates will be ready by the end of month 7, allowing all partners to work on a comprehensive Local Action Plan.

Activity	Document status	Main responsibility	Due date (month)
Detailed work plan of WP4	Public	MRI	3
Overview of the current status	Internal	CHL operators	5
Plan and timeline for stakeholder and community involvement	Internal	CHL operators	5
Report on the stakeholder and community involvement programs	Internal	CHL operators	9
Draft LAPs	Internal	CHL operators	10 -11
Local Action Plans (first version)	Public	CHL operators	12

First year of CHL operation (M13-M24)

The first year of operation is a “test run” of the new, inclusive models developed in the LAPs. Also, this is the working phase when the diverse knowledge of the project consortium partners should start to be channeled into the project in order to improve the quality of work performed on the sites.

- Task leaders for tasks 4.2, 4.3 and 4.4 will be asked to develop work plans with the aim of facilitating knowledge exchange between CHL operators and project partners with specific knowledge.
- As part of channeling knowledge for each task a brief working paper will be developed to help the work in the CHLs in community development and multi-stakeholder management, innovative financial tools, and regional integration. The exact focus of these papers will be decided by the task leaders in cooperation with the CHLs.
- Preliminary lessons will be summarized from WP2, showcasing applicable methods/models operating in the Observatory Cases for the CHL sites.
- In the meantime, The Task Force team is preparing a methodological guidance for the peer-to-peer review sessions, and by the end of Month 24, the first three review sessions will be already conducted.
- By the end of Month 23, each CHL operator will prepare a report on the results of the first year. This report will contain the main activities implemented during this period, the innovative elements incorporated in the operational model, the main constraints and difficulties CHL operators faced during their work, and further possibilities to be utilized in the upcoming project period. These reports will serve as a basis for the Interim progress report prepared by MRI by the end of month 24 and will contribute to the revision of LAPs as well.

Activity	Document status	Main responsibility	Due date (month)
Work plan for task 4.2	Internal	UGENT	13
Work plan for Task 4.3	Internal	STIFTUNG TRIAS	13
Work plan for Task 4.4	Internal	OW SARP	13
Inner report on the applicability of specific OCs models/methods (input from WP2)	Internal	EUTROPIAN-UBER- MRI	14
Good practices in community development and multi-stakeholder management (working paper)	Internal	UGENT	17
Management of innovative financial and business solutions (working paper)	Internal	STIFTUNG TRIAS	17
Regional integration and territorial management of CHLs (working paper)	Internal	OW SARP	17
Methodological guidance for Task Force (TF) peer-to-peer review sessions	Internal	CEU	18
TF review sessions 1-3	Internal	CEU	22-24
Inner report on first year operation results	Internal	CHL operators	23
Interim progress report and revised LAPs	Public	CHL operators and MRI	24

Second year of CHL operation (M25-36)

The period between months 25-36 is devoted to the implementation of the revised LAPs, integration of the experiences and new knowledge gathered in the OpenHeritage project. CHLs still work in strong cooperation with the partners having outstanding expertise in community development, financial tools and regional integration and begin to apply the toolkit developed. MRI is facilitating their cooperation and pays particular attention to achieve the balance of the main project pillars for every single CHL.

The Task Force team is continuing its work with the remaining three review sessions and by the end of month 36 they prepare an Evaluation report, focusing not just on the lessons learned from the peer-to-peer reviews, but also on the opportunities of widespread adaptation of some operational/management tools and/or models.

In the inner reports on the second year operation results some more-or less complex management structures and inclusive management models are already presented by the CHL operators.

Activity	Document status	Main responsibility	Due date (month)
TF review sessions 4-6	Internal	CEU	25-26
Report on improvements in community development and multi-stakeholder management in the CHLs	Internal	UGENT	34
Report on applied of innovative financial and business solutions in the CHLs	Internal	STIFTUNG TRIAS	34
Report on regional integration and territorial management of CHLs	Internal	OW SARP	34
Report on the second year operation results of CHLs	Internal	CHL operators	34
Evaluation report on the Task Force	Public	CEU	36

Third year of CHL operation (M37-48)

Although CHLs are operating with full capacity, from the project’s point of view the main objective of this phase is to draw the conclusions, to focus on the transferability of the new knowledge and experiences, to provide feedback on the toolbox and most importantly to create the blueprint of transferable inclusive management models(s).

To help these activities an operation report will be written by the CHL partners for internal use, which will contribute to develop the final evaluation report. The latter will not just summarize the results of the six CHLs, but will include some of the project’s key findings, like the inclusive management models and a set of different solutions that are transferable and applicable under diverse cultural and socio-economic circumstances.

Activity	Document status	Responsibility	Due date (month)
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Report on the third year operation results	Internal	CHL operators	45
Final evaluation report draft	Internal	MRI	46
Final evaluation report	Public	MRI	48

7. List of WP4 partners

All project partners are involved in WP4, but their roles and responsibilities are different.

Partners operating Cooperative Heritage Labs

Partner's name	Contact person	e-mail
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