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**OpenHeritage: Deliverable 4.4 (Report)**

# **Evaluation report on the Task Force**

**2022 August**



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## Executive summary

The aim of this deliverable is to describe and generalize the methodology followed by the Task Force for adaptation under other circumstances. The Task Force was introduced to support the six OpenHeritage Labs in developing inclusive governance and financial structures. It consists of experts in heritage conservation, regional development, environmental protection, innovative financial tools and cultural development with the aim to provide counselling and assessment through peer review sessions for the Cooperative Heritage Labs (CHLs or Labs).

As it will be explained in detail in the deliverable, the process, originally foreseen to include only a mid-term visit and assessment by the Task Force members, was expanded. The peer-review process gained importance, with in-person site visits by consortium members, and the setting up of smaller task forces – focusing on heritage/community and finance – from within the consortium. All activities aimed at integrating knowledge and increasing the uptake of innovative solutions.

Importantly, the work of the Task Force and the entire peer review process was profoundly influenced by the COVID19 pandemic, as the entire peer review process had to move online as a result. In the course of the project, the peer review process was broken up into four actions:

### Starting in pre-pandemic times

- 1) Small specialized task forces were created from the consortium that worked with the Labs on a need basis;
- 2) Site visits were organized for all participants before the in person consortium meetings. These served as the foundation for the ensuing online activities and consortium-based peer-to-peer exchanges.

### During and (post) pandemic:

- 3) The original (described in the Grant Agreement) Task Force was activated, and a webinar series was organized in the spring/early summer of 2020 to replace the Task Force visits of the Labs, foreseen for a mid-term assessment.
- 4) Sustainability Workshop series, organised with the involvement of the Task Force members, were carried out in the summer/early fall of 2022.

This combination of the task force methodology with the peer-review method offered the benefits of a long-term in-depth engagement with that of a fresh perspective and extra knowledge brought in by external feedback. The experience highlighted that adaptive reuse projects benefit substantially from joining networks or establishing fora for knowledge exchange and peer-to-peer reviews. This practice generally promotes the principles of openness – both regarding knowledge and space – and helps to keep adaptive heritage reuse an inclusive and transparent process.

To understand better the details of the peer review process and the task force events, and to provide methodological guidance for later projects, the current deliverable first summarizes what the task force methodology means and how it was carried out in OpenHeritage (see section 1). Then section 2 focuses on the process in more detail, outlining the different techniques employed by the project. Finally, it closes in section 3 with short methodological considerations. The Annex (section 4) contains diverse supporting documents.

# 1 Task Force as a methodology in OpenHeritage

Task force is an established tool in management to cover tasks where specific expertise is needed that is not present in the original team. This is usually the kind of knowledge or expertise that covers various areas or disciplines, whereby a task force group is temporarily established to solve a specific problem. Members are selected based on their individual competence (Ware 1995).

The application of task forces specifically in the field of heritage has not been theorized yet. However, based on a review of practices, the following four areas can be distinguished when task forces are used:

1. *To deal with an urgent problem emerging due to some specific conditions.* These situations are always connected to the idea of saving heritage that is at risk. – this fits to the concept of heritage being at risk. For example, the US Heritage Emergency National Task Force founded in 1995 is a partnership of 42 national service organizations and federal agencies created to protect cultural heritage from the damaging effects of natural disasters and other emergencies (Task Force History). The 'Task Force Cultural Heritage' of the Karlsruhe Institute of Technology was established to systematically examine whether and how to contribute to the preservation of the cultural objects with the help of the existing competence and skills at KIT (technical, scientific, cultural), recognizing that heritage is subject to various risks caused by weather and natural influences, and human behaviour – such as military conflicts, social changes, or pollution – which can lead to a loss of cultural relics. To counter these risks and to allow for the conservation of material heritage, multidisciplinary collaboration is required (Task Force Cultural Heritage). As a third example, the Syrian Heritage Task Force provides an organizational framework for addressing emergency preservation concerns among heritage professionals and activists inside Syria, training, documenting and advocating for heritage protection among the international community (The Syrian heritage task force). This area of task force activity did not appear in OpenHeritage and was not considered as a main goal when designing the task force method but might be relevant for adaptive heritage reuse projects too.
2. Another objective to introduce task forces in the field of heritage is *to make sure that an important issue gets enough exposure and representation in the processes.* Europeana was established to empower the cultural heritage sector in its digital transformation. They develop expertise, tools and policies to embrace digital change and encourage partnerships that foster innovation, in order to use cultural heritage for education, research, creation and recreation and to contribute to an open, knowledgeable and creative society. They operate with Task Forces and Working Groups, where Task Forces are designed to help solve specific issues and challenges affecting the digital heritage field while Working Groups are set up to address ongoing activities and issues of continuing relevance within the Europeana Network

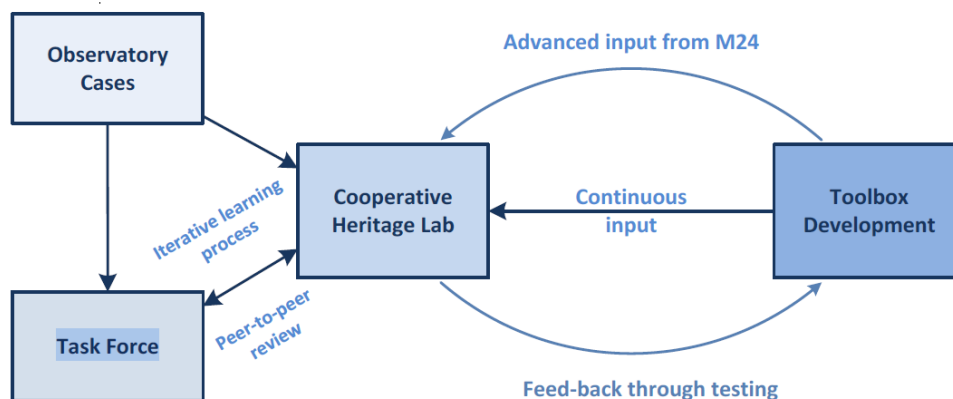
Association. They invite proposals for setting up Task Forces with any issues via an open call (Task Forces and Working Groups).

3. The third area where task forces are applied in the field of heritage is *during a specific point or phase of a process or project to prepare a plan, strategy, or to provide feedback*. For example, the American Anthropological Association set up a Task Force on Cultural Heritage in 2013 to help develop an organizational strategy for addressing issues relating to cultural heritage worldwide. The Task Force prepared its report in three years, and the Executive Board developed a set of principles (AAA Executive Board Cultural Heritage and Values) based on that to be used by the EB to assess the merits of proposed partnerships, initiative or requests for advocacy on cultural heritage matters (Participate and Advocate). The Equality, Diversity and Inclusion Review Task Force set up by the UK Heritage Fund was aimed to identify ways to drive greater equality, diversity and inclusion within The Heritage Fund and across the heritage sector and to help define the vision of inclusive heritage to guide the operational and grant giving activities (Equality, Diversity and Inclusion Review Task Force).
4. The fourth area is *that of missing skills: here knowledge, or human resources are brought in when needed in the process of the activities of heritage projects or organizations*. For example, the Eco Heritage Task Force is a volunteer-based environmental and reconstruction programme of the Croatian Heritage Foundation that take the necessary skills, knowledge, and resources to heritage areas and sites to help solving issues and raising awareness at local or regional level, thus giving a boost to heritage (Eco-Heritage Task Force).

The task force method as applied in OpenHeritage was aimed to combine the last three areas: to make sure that OpenHeritage principles are represented, to help prepare/review the Lab Action Plans – these were the guiding documents of the Labs' work - and to help identify and provide the skills and expertise lacking in the respective Lab teams.

**The Task Force of OpenHeritage** consists of experts with outstanding combined knowledge in heritage conservation, regional development, environmental protection, innovative financial tools and cultural development.

The designed task force methodology is part of an elaborate feedback process (see Figure 1 below). Feedback has been an instrumental part in the Lab operations, ensuring they bring together innovation and practical intervention while preserve their flexible character, serving to introduce new ideas and to correct the work in its progress.



**Figure 1. The iterative feedback process**

The Task Force was established as a tool to provide counselling and assessment through the mid-term peer-to-peer review session of the Labs, with the aim of integrating knowledge and increasing the uptake of innovative solutions. The aim was to make sure that a variety of topics (regional development, heritage conservation, community development, environmental protection and financial sustainability) were sufficiently taken into account by all Labs.

Members of the Task Force were selected from among the consortium members and the Advisory Board.

Advisory Boards as a rule are a group of experts giving advice to the governing body of the organization. Setting up Advisory Boards is a broadly applied practice when launching new initiatives, and especially in the creative field (Weber 2016). They follow the operation of the organization or the implementation of the project. They are also applied in academic organization to enhance learning and research (Zahra et al. 2011). Since OpenHeritage combines academic research with innovation, the role of the Advisory board was a mixture of the two, academic and practice-oriented approaches. Thus the Advisory Board in OpenHeritage is assembled of organisations in a variety of fields fundamental for the complexity and success of OpenHeritage, with the aim to provide valuable insight to the project from an external, expert vantage point, and to help the process of dissemination.

The Task Force of OpenHeritage benefited from this diversity, and it became a body, where all relevant disciplines were represented. Importantly, some Task



Force members changed over the years, as they have left their position in the organisation.

*Original members of the Task Force:*

Knowledge field	Task Force member
<b>Urban and regional development</b>	Pietro Elisei, <i>ISOCARP</i> (Advisory Board)
	Prof. Michael Parkinson, <i>University of Liverpool</i> (Advisory Board)
	Luuk Boelens, <i>Gent University</i> (consortium partner)
<b>Culture - democracy</b>	Luisella Pavan Woolfe, <i>Council of Europe Office in Venice</i> (Advisory Board)
	Dea Vidović, <i>Kultura Nova Foundation</i> (Advisory Board)
<b>Heritage protection</b>	Kamma Siegumfeldt, <i>Trans Europe Halles</i> (Advisory Board)
	Tamás Fejérdy, <i>ICOMOS Hungary</i> (Advisory Board)
	József Laszlovsky, <i>Közép-Európai Egyetem</i> (consortium partner)
<b>Environmental studies</b>	Niki Frantzeskaki, <i>Dutch Research Institute for Transition - DRIFT</i> (Advisory Board)
<b>Financial tools</b>	Rolf Novy-Huy, <i>Stiftung trias</i> (consortium partner)
	Joep de Roo, <i>Eurodite</i> (consortium partner)

To facilitate feedback and exchange of ideas, in OpenHeritage the task force approach was combined with a peer-to-peer feedback and knowledge transfer process within the consortium.

**Peer-to-peer learning** is a recognized model by now in the field of heritage, also promoted by UNESCO as a form of capacity building (New UNESCO Toolkit). The Action Plan for the implementation of the Faro Convention, a key document behind the principles of OpenHeritage, contains a key element of peer-to-peer knowledge exchange, the Faro Convention Network (Faro Convention Network). The Faro Convention Network is made up of a growing number of “heritage communities” participating in a dynamic pan-European network, offering extensive knowledge, expertise and tools, within a framework for constructive dialogue and cooperation. The Faro Convention Network (FCN) is a platform made up of the heritage communities working together in line with the Faro Convention principles and criteria. The Network works towards identifying good practices and practitioners, it conducts workshops and supports members’ efforts in addressing challenges related to field of heritage. Membership in the network is on voluntary basis where interested communities go through a self-assessment exercise. Peer-to-peer learning opportunities were built in the OpenHeritage Work Plan at various points, such as the lab site visits at the consortium meetings, peer-to-peer feedback at the webinars, and small thematic online discussions or self-initiated consultations by the labs.

Peer learning has been an essential feature in OpenHeritage, supported by the project management. The Lab site visits were one arena, but these were combined with a more ad hoc solution, developed already in the course of the project. From among the consortium members specified task forces were set up to support the Labs regarding financial and heritage/community development matters. Although not formally organised, they contributed substantially to the practice of regular knowledge exchange among the participants, enabling a continuous advising, monitoring and feedback to the Labs over the entire project period. These small task forces were built on the skills of the consortium members in a targeted way, which was the benefit of the multidisciplinary consortium on the project. This

multidisciplinary profile meant the combination of academic and non-academic (private, public, and civic) partners, helping to diversify the partnership.

The use of Task Force and the diverse peer review methods received a different emphasis at various points in the project. Due to the COVID19 Pandemic, the implementation of the project diverged from what was originally planned, which impacted the activity of the Task Force as well as the peer review process: travel was not allowed or very much restricted. Still, the process followed the basic principle of open exchange, while moving online most of the activities and finding creative solutions for information exchange and in-depth learning about the labs.

## 2 The Task Force working process in OpenHeritage

Ware (1995) defines the Task Force process along the following operating guidelines:

1. Starting up the Task Force
2. Conducting the first meeting
3. Running the Task Force
4. Completing the Project

OpenHeritage completed the first two phases according to the plans but had to move phase 3 and 4 online due to the COVID19 pandemics.

### 2.1 The Task Force plan

The OpenHeritage Work Plan concentrated the activity of the Task Force, foreseeing it as a tool to support the mid-term review of the Labs. before preparing their new Action Plans. Task Force meetings were planned to take place between March and June, 2020. These were originally conceived to be part of the feed-back process for the six Labs, reviewing in peer-to-peer sessions their first operational year.

The planned review sessions were to last for 2 days in each Lab, offering enough time for the Task Force members to familiarize themselves with the site and the related activities and processes and to have both pre-structured and open discussions on issues that emerged during the visit. The Task Force visits were designed to follow the inclusive model of management in OpenHeritage and to build conceptually on the three pillars covering the entire spectrum of the operation of the Labs.

#### ***General program for the Task Force visits:***

<i>Arrival</i>	<i>day 0 or day 1 morning</i>
<i>Day 1</i>	

12.00 – 20.00

Session 1

Venue: the Cooperative Heritage Lab (CHL) site

General introduction of the CHL

- presentation of the site
- aims
- stakeholder network

Session 2

Workshop with the participation of CHL stakeholders: the three pillars in the lab and their connections

- community, heritage, finances
- stakeholder integration, resource integration, regional integration

Day 2

8.00 – 13.00

Session 3

Venue: optional

Intensive workshop on the pre-defined “weakest” aspect of the CHL; where they need help the most. Aim: to come up with a specific strategy and plan.

The Labs received a document in advance informing them about the general aim of the Task Force meetings, the list of Task Force members with their profile, and the guidelines to prepare for Session 1. They were asked to send in advance a description of what they specifically expect from the Task Force, and a list of the stakeholders they wish to invite to Session 2, with a brief profile (how they are connected to the CHL) to help the preparation of the session. They were also asked to designate a contact person who is responsible for the Task Force meeting and the communication with the Task Force members and to prepare a detailed plan of how they see the meeting on their side, since they were fully responsible for organizing the Task Force meeting they host, in every detail. A certain level of standardization of the meeting series combined with the responsibility of the local organizers ensured that the meeting is structured but flexible and adapted to the conditions and needs in each lab. The Task Lead, CEU was responsible for coordinating the organization of the meeting series and developing the detailed methodology, with the contribution of MRI, Eurodite, and Stiftung trias. This team prepared the work plan and schedule and the labs were informed.

### ***Planned schedule:***

CHL	Time of visit
Lisbon	March 30-31, 2020
Rome	April 6-7, 2020
Warsaw	April 20-21, 2020
Berlin	May 6-7, 2020
Newcastle	May 19-20, 2020 (after the consortium meeting)
Pomáz	June 8-9, 2010

However, none of the meetings could happen on-site due to the COVID19 pandemic and the related restriction.

## 2.2 Changes to the Task Force methodology

The task force methodology was reworked and enriched during the project partly to enable more knowledge exchange, and partly to adapt to the circumstances created by COVID19. Importantly, the new methodology:

- a) kept every element that was possible and moved online during lockdowns;
- b) integrated all those, diverse elements of the project that could benefit the review and feedback process;
- c) put much more emphasis on the peer-to-peer element.

As a result, it was composed of four elements:

1. Specialized task forces
2. Task Force Webinar series in Spring 2020
3. Lab site visits at consortium meetings
4. Sustainability Workshop series in Summer 2022

### 2.2.1 Specialized task forces

Some specialized groups were set up in 2019 from team members within the consortium partners who shared a specific expertise, with the aim of preparing the ground for the Task Force visits and to aid the work of the Labs. The one on heritage, continued its operation until there was a need on behalf of the Labs, and the financial one remained an active unit all along the project. The operation of these informal task forces was flexible and need-based, offering consultation when required by the labs. Initially, each Lab was invited for online “visits”, consultations focusing on specific issues.

The fact that the members in these specialized working groups have been involved in OpenHeritage from the beginning helped to mitigate the challenges listed by Ware (1995). These include 1) the fact that a task force is needed implies and inherent criticism and 2) task forces bring very different perspectives and do not know each other and the project team. For OpenHeritage these specialised task forces functioned as a team of continuously available advisors, and the fact that they were project participants meant that they knew the Labs well. This peer-to-peer consultation in the form of specialized task forces was fruitful for the Labs, it helped keeping certain issues or perspectives on the surface, and contributed to the development of their updated action plans.

#### ***Specialised task force 1: the heritage task force***

Members: Karim van Knippenberg (UGENT), Loes Veldpaus (UNEW), John Pendlebury (UNEW), Dóra Mérai (CEU)

#### Scheduled meetings:

- 18 MARCH 2019 – Pradikow
- 26 March 2019 – Praga (with a follow-up discussion the Lab asked for in April)
- 27 March 2019 - Sunderland

The discussions were designed to help the Labs conceptualize their heritage and their approach towards it. It was also an aim to identify any related expertise in the Lab and the gaps in this respect. The questions asked by the working group were aimed to help the Labs create their own heritage and value inventory. It was an important step to ask whose heritage and whose values are these, and who might be ignored or excluded in this respect. Intangible heritage received a special emphasis in the discussions, since it is always more difficult to identify the intangible elements. Questions like how to work with these according to the OpenHeritage principles of inclusiveness and empowerment, how to use them as a resource in adaptive heritage reuse, were discussed.

(See the questionnaire filled in by the Labs and discussed with the heritage task force in Annex 4.1.)

#### ***Specialised task force 2: the financial task force***

The financial task force was a small team consisting of Rolf Novy-Huy (Stiftung trias) and Joep de Roo (Eurodite), two financial experts in the Openheritage consortium. It was set up to advise and support the Labs by providing input to develop sustainable business cases through various processes and activities. The strength of it came from the extensive practical experience of its members.

It aimed to assist Labs in creating a sustainable financial model, built upon clear budgets and financing structures, and to apply inclusive solutions where possible. It continued its operation and accompanied the Labs during the entire project with the following objectives:

- creating multidisciplinary management teams for adaptive re-use.
- determining (financially) feasible plans or programmes of activities for adaptive re-use.
- actions to involve main (financial) stakeholders and institutions

in order to build a structure that enables civic groups to run their projects on a sound long-term financial basis

The conclusions of the work by the financial task force with the Labs was channelled into two tasks: task 4.3 (Management of innovative financial and business solutions) and task 5.4 (Developing inclusive business models by Eurodite). Consequently, the financial task force had relevance for the entire project, not just the Labs.

It also developed the following actions to support the Lab's (as described in detail in D3.4):

- Visit to support on the spot. Site visits consisted of introduction to main stakeholders and partners, create a feeling of the context and systems in which the transformation has to take place, joint sessions

to concretize the objectives behind the project and help to formulate clear goals and shape the business-case.

- Monitor progress and giving feedback via - input collected from Lab's via questionnaires and e-mails
  - online meetings and webinars with Lab representatives
  - written meeting/status/evaluation reports
  - input in Lab Action Plans (LAP's)
- Providing practical tools and support. This consisted of presentations at partner meetings by financial task force members (or related experts), providing financial sheets, calculation models and studies, etc.
- Develop financial guidelines and models for inclusive adaptive heritage re-use. All input collected was used to give structured input towards the Labs during the project. This took the form of financial guidelines for the Labs. It was developed in September/October 2020, before the LAP's were updated.

#### *Activities of the financial task force*

- 15-16<sup>th</sup> July 2019: Taskforce visit to Sunderland
- 15<sup>th</sup> and 16<sup>th</sup> October 2019 visit to Warsaw
- 7-9<sup>th</sup> December 2020, Rome
- Progress reports based on webinars: due to Corona, in spring and summer 2020, the financial taskforce had to cancel the planned site visits to the various Labs and continued the discussions with them during various skype sessions. Input was collected (and fed back) on Lab action plans and Lab reports and other materials that the Labs sent to the financial taskforce.
- 2020 spring: a series of online meetings with the labs (see Annex 4.2)
- Need-based follow-up meeting with the Labs
- July, 2021 – a financial webinar for all the Labs, preceded by online preparatory meetings with everyone

The financial task force provided practical tools for the Lab's to collect input and support their development, such as a milestones document, financial questions, a function-organisation-finance table. When requested by the Labs, various other models and sheets that served as examples were also sent via email. The idea is to further streamline the process of input and feedback via the financial guidelines and more regular contacts.

For an analysis of the specific conclusions and observations by the Financial Task Force, see Deliverable 4.3

### **2.2.2 Task Force Webinar series in Spring 2020**

With the outbreak of Covid-19 all the planned site visits of the Task Force, foreseen by the DoA and involving both consortium partners and Advisory Board members were cancelled and moved online. The pandemic created a situation, where it became critical to make use of online resources and tools and come up with creative solutions. At the same time, the past two years have shown that the increased role of online solutions stayed with us and became a significant added value to the project. It is safe to say now that this will be characteristic for the post-COVID are, and the OpenHeritage online Task Force work was complemented



with an additional objective to address the sustainability within what might be interpreted as a new paradigm of community development.

Task Force visits were turned into Task Force webinars, where the Labs introduced their work in detail and discussed future development options with project members and some Advisory Board members. The circle of participants was broader than in the originally planned Task Force groups since all project team members were invited to participate. The number of participants varied (between 20 and 40, with lower numbers in summer) but consortium members gave valuable input in each case. This solution largely built on the peer-to-peer approach and strengthened the application of open science solutions in OpenHeritage. The experience was that peer-to-peer feedback and knowledge transfer is a valuable and important contributions to adaptive heritage reuse initiatives. Although it remained an internal event, the webinar focusing on the Centocelle Lab was also streamed, more to experience with this format for later use.

The webinars took place between March 2020 and June 2020:

- 31 March 2020 - Webinar Lisbon
- 21 April 2020 - Webinar Praga
- 6 May 2020 – Webinar Prädikow
- 8 June 2020 – Webinar Pomáz:
- 16 June 2020 – Webinar Rome:
- 23 June 2020 – Webinar Sunderland

The Labs introduced their actual state in no more than 15 minutes focusing on the three pillars of OpenHeritage: the community and territorial governance aspects, one on the financial aspects and a last one on the heritage reuse questions. This was followed by Task Force members reacting and another, designated Lab providing targeted feedback. Every presentation was followed by an in-depth discussion session.

### **2.2.3 Consortium meeting about the Labs, peer-to-peer feedback**

Consortium meetings (in the case of the Praga Lab it was the Informed Cities Forum organised by the project) offered an opportunity to visit the Labs for the entire consortium. The program was always designed in a way that before or after the meeting half day was left to visit the site, meet the stakeholders, and discuss the experiences and questions raised. These visits proved valuable since the observations were integrated in WP1, WP3, WP4, and WP5. They also offered an informal opportunity for peer-to-peer feedback and the labs could benefit from the expertise of the entire consortium. With the COVID19 pandemic, these visits proved the only opportunity for personal visits and the Task Force webinars and workshops could build on them in a large extent. The visits took place connected to the following events:

- June 27-28, 2018 – Budapest Consortium Meeting, visit to the Pomaz Lab
- May 12-14, 2019 – Berlin Consortium Meeting, visit to the Hof Pradikow Lab
- October 15, 2019 – Warsaw, Informed Cities Conference, visit to the Praga Lab
- December 8-10, 2019 – Rome Consortium Meeting, visit to the Rome Lab

- September 4-6, 2022 – Newcastle Consortium Meeting, visit to the Sunderland Lab

The site visits did not follow any specific script but were organized by the partner working with the Lab and the local Lab community, according to their own customs. These visits offered an opportunity to meet the communities and proved to be an important source of learning in this respect as well as a memorable experience for the OpenHeritage partners. From a management point of view this was essential to help to keep the project team together and the enthusiasm alive even in the time of hard lockdown. Paradoxically, coping together with the COVID experience combined with the experience of former common site visits considerably strengthened the weight of the peer-to-peer feedback and knowledge transfer element in WP4.

#### 2.2.4 Sustainability Workshop series in Summer 2022

Although there were plans made, the Task Force site visits could not be organized as actual travels within the running time of OpenHeritage. As a result, WP and Task leaders (MRI and CEU) jointly decided to organize an online sustainability workshop series with selected Task Force members primarily addressing the issue of sustainability in the context of the Labs. The meetings are taking place from June to September 2022, via Zoom. Two Advisory Board members or in case they were not available, other experts with similar experience were invited to discuss the results and future of the labs and to provide feedback. A questionnaire was prepared to structure the feedback process. The meetings are peer-to-peer interviews with the Labs (each of them lasting 90 minutes). The questionnaire covers questions for different areas of sustainability (heritage, regional, environmental) but the experts need to focus on the area of their expertise you should not and the specific potential/character of each Lab. They also need to summarize their observations/recommendations for the Labs in writing.

*Members of the online Task Force:*

<b>Dea Vidovic</b>	Kultura Nova Foundation	participation, community development
<b>Mieke Renders</b>	Not Quite (formerly Trans Europe Halles)	creative and cultural industries, community building, ethical reuse
<b>Tamás Fejérdy</b>	ICOMOS Hungary	heritage conservation
<b>Miruna Draghia</b>	URBAN2020	Urban development, participatory governance
<b>Tiffany Fukuma</b>	Trans Europe Halles	creative and cultural industries, community building
<b>Pietro Elisei</b>	ISOCARP	sustainable urban and regional development

*Schedule of the sustainability workshops with the Task Force*

	Sunderland 14 July 2022	Hof Pradikow 27 July 2022	Pomáz 21 July 2022	Rome 15 September 2022	Lisbon 20 September 2022	Praga 14 September 2022
<b>Dea Vidovic</b>			x			x
<b>Mieke Renders</b>	x		x			



<b>Tamás Fejérdy</b>					x	
<b>Miruna Draghia</b>		x				
<b>Tiffany Fukuma</b>				x		
<b>Pietro Elisei</b>				x	x	

### 3 Methodological conclusions for the transferability of the OpenHeritage Task Force and peer review method

Adaptive heritage reuse (AHR) is a transdisciplinary enterprise. A broad range of expertise is needed, and often these are not represented in the teams. The Task Force method helps to bring in these skills and knowledge. This is typically expensive knowledge, and regularly requiring long-term commitment. The peer-to-peer approach at the level of adaptive heritage reuse projects allows to follow each other's activity on a broader time scale and to gain deeper knowledge about the processes, conditions, and people in the project, a precondition of moving one step further than offering cookie-cut solutions. OpenHeritage aimed to create models based on on-site experiences, but the models were continuously adapted to the actual situations. The Task Force helps to bring this methodology to underfinanced, bottom-up driven initiatives and places, who mostly lack the financial resources to hire the help they need.

OpenHeritage offered an opportunity for six adaptive heritage reuse experiments (Labs) to cooperate, and created the necessary conditions for continuous peer-to-peer reviews. This allowed Labs to share the expertise they have, complemented with experts outside these experiments. The framework created was a good format, and four years was a suitable timeline to gain enough knowledge about the labs and support them in an appropriate and meaningful way. The key question for similar adaptive reuse projects is to find the forum or format for similar cooperations/peer-to-peer reviews. International organizations such as Trans Europe Halles or local networks like Netzwerk Zukunftsorte (<https://zukunftsorte.land/>) all offer a good opportunities to find partners, to exchange knowledge and to focus on particular topics, even by forming smaller groups within a larger organization.

OpenHeritage aimed to create models based on on-site experiences and peer-to-peer interactions, using the Task Force as a tool to broaden the knowledge of the Lab operators. It also worked with specialized task forces at various phases of the project, for example, in the field of heritage and financial solutions. These experiences yielded many insights, besides providing valuable input to the Labs. Among others it became clear even if there are good models created by experts for certain constellations, Labs are not always ready to take the necessary steps immediately: not everything is possible at every point of time in the life cycle of a project, as it appeared, for example, in the Pomáz and Praga Labs.

However, the experience of the Pomáz Lab demonstrates that often understanding the situation with the help of experts and being able to analyze it, identify the model they follow, helps to move forward. The peer-to-peer cooperation of AHR initiatives not only allows to share the expertise accumulated within each project respectively but also offers an opportunity for personal, deep involvement and a sensitive approach that takes into consideration the human element as well.

The peer-to-peer approach also helped to identify in OpenHeritage what kind of expertise is needed for which Lab in which phase. The heritage task force, for example, helped to reconceptualize for the Hof Pradikow team their understanding and vision about heritage, and this proved to be useful at an initial phase. Later the cooperation allowed a continuous feedback and confirmation of the developments along these lines.

Besides internal ones, external task forces, have their own advantages, and there are situations when a interventions from actors who make suggestions based on a horizontal overview of a project at a certain point of time might be the best contribution. The Task Force of OpenHeritage was similarly an external group of experts. It could offer useful advise, bringing in a much needed outside perspective, and questioning some basic assumptions the local initiatives have. It was mobilized in a prescheduled timeline to help the monitoring and feedback process, putting sustainability, mid- and Long-term development into the focus.

Finally, the cooperation of AHR initiatives not only brings the benefits of peer-to-peer approach but this offers an opportunity for setting up a Task Force or an Advisory Board together and sharing the financial burden of involving external experts too.

The combined Advisory Board and Task Force methodology on a peer-to-peer basis corresponds to the resource integration principle of OpenHeritage in terms of financial and human resources. It promotes the principles of open knowledge and open space, and helps to keep Adaptive Heritage Reuse an inclusive and transparent process, contributing to the construction of inclusive and democratic societies.

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## 4 Annex

### 4.1 Questionnaire to the Labs by the Heritage Task Force (2019 Spring)

#### Material and Immaterial Heritage in the Labs

1. *About the Lab*

- How are heritage-related professions represented in your lab team?
- Is there any (additional) expertise you are looking for in particular?

2. *About the site*

- Which is/are exactly the building(s) to be reused? How wide is your remit/influence?
- Are they protected as historical monuments or as any other category?
- What historical research has been undertaken upon the site? Is the research undertaken purely historical or also aimed at evaluating the (relative) importance of the site? I.e. how have heritage values been identified?

3. *The story of the site*

3.1. Inventory of the material aspects:

- What are the construction phases?
- What was the original function?
- What were further or additional uses, if any?
- Do(es) the building(s) have architectural value(s)? If yes, what is it? For whom / defined by whom?
- Do(es) the building(s) have aesthetic value(s)? If yes, what is it? For whom /defined by whom?
- Do(es) the building(s) have historical / age value(s)? If yes, what is it? For whom /defined by whom?
- Do(es) the building(s) have any other values (e.g. social, ecological, technical) in the heritage context? If yes, what is it? For whom /defined by whom?
- Do(es) the building(s) have community value? If yes, what is it? For whom /defined by whom?
- To what extent and in what respect do you see the building(s) as typical or unique?
- Can you think about any phase, element, function you did not include into the answers for the previous questions? What do you think, why did you exclude them, and why did you include the others?

3.2. Inventory of the immaterial aspects:

- Are there any events or practices connected to the place? For whom /defined by whom?
- Are there any stories connected to the place you would mention? For whom /defined by whom?

- Can you think about any use or story you did not include into the answers for the previous questions? What do you think, why did you exclude them, and why did you include the others?

4. *Conservation, adaptive reuse:*

- (Do you have a plan for / method of defining) which elements are valuable (definitely to be preserved) in the exterior? Why?
- (Do you have a plan for / method of defining) which elements are valuable (definitely to be preserved) in the interior? Why?
- What would be lost if the buildings were demolished or reconstructed without preserving any original elements?
- Any already lost elements you would like to bring back?
- What are your reference projects for how they dealt with heritage (either tangible or intangible)?
- Could you please briefly describe the state of conservation of the building(s)?
- Is there a conservation element connected to the lab's action plan?
- How do you intend to deal with the material side – conserve – rebuild - ...? What are the legal restrictions around it?
- Who will do the planning and how?
- What functions do you imagine for the building? How is it connected to the past uses of the building?

5. *Environment:*

- What is the role of the building – in its material sense and in terms of its uses and the practices around it – in its environment (e.g. the street, the historical plot system, the character of the neighborhood)? Did this change over time, how is this change relevant?

6. *Heritage communities:*

- Which are the communities who could be targeted by the lab? (Both local and visitors or potential online communities; try to segment them as much as you can).
- Which heritage value would you offer to which group, and why do you think it would be attractive for them? What values would be relevant to / produced by which groups and what are the potential conflicts?
- What could be the narrative of the site communicated towards these groups? (It can be different in the case of various groups or communities.)
- What kind of communities were related to the site in the past? Were there any communities whom we are forgetting at the moment? Why? Any that need extra attention?
- Heritage values are not just what experts say – Have you done any activity to explore what various communities think about the site as heritage, what is valuable for them and why? How can you imagine to explore this? Which community groups / people / locals will you talk to, invite, engage with to understand how they value this site? Are there conflicts you foresee between how those groups value the site?

## 4.2 Questionnaire to the labs by the Financial Taskforce (February 2020)

As part of the taskforce meetings, the financial taskforce (Rolf Novy-Huy and Joep de Roo) will support the Cooperative Heritage Labs on the financial feasibility of the planned investments and daily exploitation of the lab.

### Goal for financial taskforce

- 1) During the site visits and its aftermath, the main objective of the financial taskforce is to help the LABs with making their budgets and financing structures, where possible with an inclusive/group character.
- 2) A secondary objective is to assist the Lab's in determining a (financially) feasible plan/ programme for adaptive re-use based on experiences of the financial taskforce members.

The financial taskforce will, together with the LAB's work on the following products:

- 1) Investment budget: foreseen costs to make the site(s) ready for use.
- 2) Exploitation budget: overview of (yearly returning) costs and benefits.
- 3) Overview of inclusive/ group financing and ownership possibilities within local contexts.

To create these 3 products, we will need as detailed as possible information on:

- 1) The site: **Where?** Pinpoint exact scope and location of the site(s), m2, ground plans, photographs, ownership, current use, density of surroundings.
- 2) The plan: **Why?** Motivations to transform the site. **How?**: the programme/activities to transform the site, **What?** function(s) do you foresee? What investments are needed, what revenues can be expected? **When?** timeschedule.
- 3) The team/group/stakeholders: **Who?** Leader of the group? What skills do you have/need in the team. How many people can you address to support your project? Is there support of municipality, the region, donations etc.?

Any information that can help to get a clearer picture of these questions is welcome and can be send to the financial taskforce members before the meetings.

## 4.3 Program for the Task Force Webinar on 8th June 2020

10.00 – 13.00 Pomáz lab, Hungary

10.00 – 10.10 Introduction

10.10 – 10.40 Short presentation of the Pomáz Lab – app. 15 min presentation + 15 minutes discussion

15 minute discussion – general remarks/questions from the audience

10.40 – 11.20 Heritage communities and public engagement

- Heritage values and the heritage communities
- Online public engagement: [pomaz.openheritage.eu](https://pomaz.openheritage.eu) (the participatory platform), [glasshill.eu](https://glasshill.eu), [social](#) media.
- Challenges and lessons learned

11.20 – 11.35 Short break

11.35 – 12.10 Territorial integration and governance development

- changing relations to the local government
- site management structure

12.10 – 12.55 Financial model

- Replanning after the epidemics

12.55 - 13.00 Closing remarks

## **4.4 Questionnaire on the Sustainability of the OpenHeritage Labs for the Task Force Webinars (2022 June – September)**

### **Heritage - culture:**

- How do you assess the main heritage/cultural potential of the area?
- How is heritage used now and by whom?
- Can you identify well formulated aims regarding heritage? Are the Labs operating towards these aims?
- Which values have been put to the core of the OH project by the stakeholders, and how do they relate to the heritage values they attribute to the asset/site?
- For whom does this heritage create a sense of belonging, and who is being excluded; for whom is it a resource for economic development, and who is being displaced?
- To what extent has the heritage/cultural potential of the area been utilized in your opinion?
- How would you develop it further - both mid- and long term?
- What would you do differently and why?
- How would you develop the current network further?

### **Regional integration**

- How would you assess the current regional position/situation of the Lab?
- To what extent has its regional potential been utilized so far?



- Have the OH project activities supported the involvement of different players?
- Are the local authorities playing a facilitating/supporting role? Are they supporting the development of innovative ideas?
- Does the existing governance model of the Lab stimulate innovation of spaces or areas?
- What would be the most important developmental aims you would suggest? (Both mid-term and long-term)
- Where do you suggest changes and why?
- Do you have any network building suggestions?

### **Environmental sustainability:**

- How do you see the role of environmental sustainability in the Lab currently?
- To what extent has the Lab exploited the potential of circular economy so far?
- What would be the main lines of development you suggest? What is the strategy you suggest to follow and why?
- Can you suggest partner organisations to team up with?

### **Flexibility/resilience**

- How did the Lab react to the Covid-19 crisis?
- Is there sufficient capacity to respond successfully to such sudden challenges like the pandemic?
- Is there any kind of explicit or implicit strategy of the Lab that serves resilience (e.g. adaptability, diversification, ecosystem building, etc.)?

### **Other observations**



## 4.5 Sustainable Placemaking Model Canvas by Eutropian

Who are you? ID your organisation.		Capacities?  What do you lack?		What is the demand? Identify your place's challenges.	Key Collaborators, sponsors, stakeholders		Their Capacities? Who      What		
ORGWARE Name    What Org/group    Role    Funded hours?					Community rlshtps		Channels Who      What		
Place + context (existing gov. & processes)				Activites & Interventions					
Cost Structure Out of pocket What    How much    Who pays			Personal Hours How much    From who    Capacity		Revenue/Funding Streams Where    How much    Frequ.    % to cover costs    % for future & how...				
GOVERNANCE - how are decisions made, on what, and routines for decisions									
Social Value What specific value is created?		Which stakeholders benefit most?		Environmental Value What specific value is created?		Which stakeholders benefit most?		Economic Value What specific value is created?	

## 4.6 Sustainability recommendations for the Hof Prädikow Lab

Prepared by Ph.Dc. Miruna DRAGHIA<sup>1</sup> (urban and regional planner @ SC URBASOFIA SRL)

### Organisational aspects

The Sustainability Webinar focused on Hof Prädikow case study has been organised on the 27<sup>th</sup> of July, from 15,30 – 17,00 CET. The format was following a peer-to-peer interview with the stakeholders involved in the Hof Prädikow Lab, covering different areas of sustainability, with a strong focus on heritage - culture, and regional aspects. Therefore, the recommendations are structured around these two thematic areas, with some general observations.

### General recommendations

At a first glance, Hof Prädikow project serves as a model for the preservation of a cultural/ historic monument in rural areas. By adopting an approach based on preserving as much as possible from the old building fabric and the historical

<sup>1</sup> General Manager of EU-funded projects at [URBASOFIA SRL](#), project manager of various projects focused on heritage topics, such as [ROCK](#) - the use of cultural heritage as a catalyst for urban regeneration, [ISTER](#) - the use of cultural heritage as a driver for territorial attractiveness and international cooperation/ networking.

character of the site, the project became soon attractive for a wider audience, which includes not only inhabitants of the manor, but also neighbours of the village and the wider region. The increasing level of attractiveness due to fast changes can raise several challenges on the long term. For this reason, the following general recommendations are suggested:

- (1) Develop a clear mid- to long-term vision (5 to 10 years) for Hof Prädikow and the surrounding area, accompanied by a sustainability plan, which considers both strategic elements (position and relation within the wider territory) and operational aspects (economic/ financial, social, environmental, communication, etc). This kind of plan should govern the future development of the area, maintaining a permanent balance of preservation and development actions for Hof Prädikow heritage site, emphasizing the heritage value of each intervention in this area.
- (2) Find solutions for an adaptive repurposing of the entire Hof Prädikow heritage site to fit the current needs of the community, securing its preservation. Test new uses through temporary phased-interventions, such as indoor and open-air events, to identify how to accommodate new functions (education, exhibition, film premises, lectures, photography, screenings, conferences, etc) in the existing setup (housing, bar-café, co-working space, farmers-garden).
- (3) Negotiate and keep a proper balance of different stakeholders' interests (Stiftung trias, SelbstBau eG, Hof Prädikow e. V., Netzwerk Zukunftsorte, village community), to bridge the gap between the conservation needs and economic use of heritage.
- (4) Be transparent about the selection process of the tenants, the costs of living in the area, as well as the funds invested in the development of the Hof Prädikow project (sources of financing, investment shares, stability of financing, maintenance costs, etc).
- (5) Build a resilience strategy to adapt to situations such as a new wave of the COVID-19 pandemic outbreak, exploding prices for construction materials to allow access to affordable spaces.

Whereas Hof Prädikow project seems to have a strong local support (at least in what concerns the future tenants), there are still several aspects which might become critical in a medium-/ long-term in terms of the project embedment into the historical context of the area. Therefore, a set of **specific recommendations on the Heritage – culture thematic** is listed below:

- (1) Achieve convergent perspectives on the heritage value among all interested parties. Put a strong focus on the real value that's hidden inside this place and use a common language (key messages) with all stakeholders when assessing the main heritage/cultural potential of the area. Conduct constant educational activities in order to raise awareness on the importance of the heritage and its values and to enhance the knowledge about it and the users' sense of appropriation of the area. Create opportunities for users to understand its value.
- (2) Ensure (non-physical) accessibility to the Hof Prädikow area by actively involving different social groups and make transparent regulations on

permissions that can be given to ensure equal treatment.

Make sure to create a social mix for sustaining Hof Prädikow as a functional socio-cultural hub and initiator of societal changes. Facilitate a dialogue between the “long-term-dwellers” and the “newcomers” to safeguard the value of this area.

- (3) Apply an environmental-friendly approach in the restoration works and the revitalization process. Follow energy efficiency principles for the interventions over the built environment such as renovations and maintenance works, including the use of local construction materials as much as possible, the heating system, the ventilation system and thermo-isolation (use materials with low environmental impact). Involve local craftsmen in the renovation works.
- (4) Think of possible co-branding activities that put the heritage value at its heart, in collaboration with artists, designers, business sector, creative industries, tenants and the village community.

Since Hof Prädikow is located only 14km away from Strausberg (next city) and 60 km away from Berlin, the area is highly prone to the suburbanisation phenomenon (characterised by monotonous single-family housing estates, increasing commuter flows and even gentrification). Despite its quite remote position inside the region, accessibility is not a decisive factor in the users’ choice for living in the area. However, the area has a high regional potential to become a centre of interest and generate a multiplier effect for the surrounding territory. Further elements such as nature, leisure, infrastructure and facilities could strongly contribute to build an agglomeration spot in this rural setup. Therefore, a set of **specific recommendations on the Regional integration thematic** is listed below:

- (5) Use the presence of Hof Prädikow project as a model for heritage preservation and development actions and the heritage value itself as a “competitive advantage” of the area. Promote this unique selling point for enhancing the regional awareness and attractiveness of Hof Prädikow area.
- (6) Ensure (physical) accessibility to the Hof Prädikow area by promoting “soft” mobility, including pedestrian and cycling infrastructure, shared spaces inside the project area, but also between this area and the surrounding territory.
- (7) Ensure a sustainable model of living for the tenants, securing the property by ownership and long-term access to the rentals, as well as affordable prices for different social groups (regulated through clear contracts for renting).
- (8) Keep the momentum alive and continue to organise regular consultation workshops with different stakeholders (civic groups, users, village citizens, future tenants, etc), also after the official ending of the H2020 grant to debate future plans for the Hof Prädikow area. Facilitate the organisation of field trips, guided tours for the “newcomers” to this area.

## **4.7 Sustainability recommendations for the Sunderland Lab**

*Prepared by Mieke Renders*

### **Future of Sunderland Lab**

During the last years, the Sunderland Lab has done a tremendous effort to develop first three –now four – houses on High Street. The houses are partially renovated and are in use. This started a snowball effect and other houses in the same area are being cleaned up too. The area still houses lots of potential, as momentarily there is still lots of deprivation in the area and no money to do something with it. This could change as the Trust is now also taking on the Tyre Workshop and helps & stimulates the further & continuous development of this part of the neighbourhood into a cultural hub.

It is obvious that the project started to inject life into the area, as it started as a catalyst (the 'why' of the project). The additionality of the project was the housing scheme which was brought forward: people living in the area and in the houses will be critical to keep the area thriving. The project offers cheap space to creative people and to people from the community who need a space to meet, organise and for encounters.

The houses are used by all kinds of age groups and ages are well spread which is a very strong factor, as will create sustainability in the long run. The music concerts attract people in mid-life; there are projects with teenagers or for young toddlers. The audiences who drink a coffee and/or listen to gigs are between 25-40 years (remark: this is an age group which is very hard to attract and to remain in many cultural institutions!). During the online talk, there was no mention of seniors/pensionaries, which could be a target group to work on in the future, e.g. through volunteering work, knitting clubs, heritage activities, etcetera.

Whilst activities increase in the buildings, the heritage element disappears a little to the background. Besides of the visible buildings (tangible heritage), there is not much action on keeping heritage alive and organise actions around it. It would be wise to develop its legacy and document the stories that are around in the area, as there are many stories & histories. The whole area had lots of quakers (anti-slave movement), it used to be a department store ran by Quakers, and some other weird stories. Working with intangible heritage could be some advice to work on in the future. Guided tours could be organised, walks in the neighbourhood, picture collection, stories recording, ... The local group Heritage Action Zone is working on this. Together with the community building efforts, this can be developed more and create pride about the area. This will be a long-term effort and EU projects could help the development of this.

### **Recommendations**

The original 'why' for the project should never be forgotten and should always be at the centre when the trust would adapt its governance rules, or ownership

structure in the future! The catalyst function as a community space should be kept at its core.

## NETWORKING

- Continue the search for international and EU-projects (on Research, heritage, ...) and include similar stakeholders and colleagues of other British cities (and beyond UK). Keep raising awareness about this wonderful project through giving of presentations, participation in (inter)national project, research papers, talk talk talk, etcetera.
- The former recommendation will also keep the interest of local & regional politicians who are your best supporters to carry forward this project to the next level embedding this in the city's strategy. They are proud, so keep it like that.
- Continue and develop the work to strengthen your local and regional position. Sunderland is seen in a particular way in the Northeast: post-industrial poor city, brain drain, nothing to do. But this project is a game changer/changemaker! Be proud of this and shout it out. There is a clear impact on the neighbourhood and on the image of Sunderland (in some year's time, this will be clear) and will attract more attention and interest.
- Keep thinking out-of-the-box for the networking and cross-sectoral engagements (eg. a people's supermarket, housing initiatives, banks, schools, all kinds of cooperatives, Oxfam, ....) as this will fertilize your base of customers and bring very different audiences.

## MARKETING AND INCOME

- Market these places in a firm B2B way as a platform for community development and catalyst for the area (with cheap rental places, easy access, etc). This will help to income diversification so not to lean too much on one or two main organisations.
- Creative people need cheap space: continuous offering in this and expand your network function with local and regional socio-creative-cultural organisations (see above B2B), welcoming a bright variety of organisations.
- Work more with senior groups/pensionaries as an extra target group.

## HERITAGE

- The group of buildings are a heritage 'trump card'. Identify well defined aims towards heritage and include this within the 'heritage action zone', playing a major role in it. Develop the heritage aspect and its disclosure towards the public (offline and online presence of the heritage), beyond the display on the front wall. Work together with local and regional heritage and touristic institutions. The persons working at the welcome desk could be the first agents for the history of the heritage.
- Develop easy-accessible outdoor activities including heritage actions, as e.g. street fairs, second hand, a local vegetables/fruits market, knitting clubs, cards playing clubs, ...

## GOVERNANCE

- Work on a governance plan in which the trust gradually fades out and is taken over by a platform who is the 'neutral' actor, serving all tenants equally. This governance model can be a form of cooperative in which each tenant has an equal say. This needs to be investigated (hence international funding which could stimulate the research towards a good governance model).
- Is there a need and how can you involve local engagement within the governance model? Needs to be looked up in other countries and applied in Sunderland.
- Rather soon, some kind of management committee needs to be set up in order to control the tenants committee. The management committee will trust its tenants reaching out to their communities. Make clear rules & regulations on who can be a tenant and who not. Take care of hosting a good spread of social initiatives as tenants.
- Beyond the yearly action plan, set up a strategy with a mid-term and long-term action plan for the organisation, respecting its mission and vision. Revise on a yearly basis, whilst making up the yearly action plan. Think big and visionary in the strategy.