

HOW TO ORGANISE A SUCCESSFUL TRAINING TO IMPROVE MANAGEMENT IN THE CULTURAL HERITAGE SECTOR

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Version 5

1 | 2021





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LIST OF ACRONYMS

- CCI - Cultural and Creative Industries
- CH - Cultural Heritage
- EaSI - Employment and Social Innovation
- EIB - European Investment Bank
- EIF - European Investment Fund
- ERDF - European Regional Development Fund
- ESF - European Social Fund
- ESIF - European Structural and Investment Funds
- IB - Intermediate Body
- MA - Managing Authority
- PA - Public Administration
- PPC - Public-Private Cooperation
- PPP - Public-Private Partnership
- SMEs - Small and Medium Enterprises



1. THE PURPOSE AND STRUCTURE OF THIS TOOL

This tool¹ is a result of the Interreg Central Europe project “For Heritage (4H): Excellence for integrated heritage management in central Europe”. As to promote excellence in heritage management, the project and this document capitalize on the existing knowledge gathered from the previously EU-funded projects (such as FORGET HERITAGE, RESTAURA, IFISE, CLIC) and other relevant experiences.

Within the project six tools related to heritage management have been produced: (1) Good/participatory governance in cultural heritage: How to involve public, (2) Financial instruments and innovative financial schemes for cultural heritage, (3) The use of public-private cooperation approach in cultural heritage revitalisation, (4) Impact assessment of cultural heritage projects, (5) Transferable elements of cultural heritage revitalization pilot projects, and (6) How to organise a successful training to improve management in the cultural heritage sector.

The following pages aim to provide **practical information** and **some hints** about organization of trainings for improving cultural heritage management for various target groups, e.g. public administration staff, cultural heritage managers and operators.

The tool is structured as follows: In the first part the main stages and key activities for efficient preparation, implementation and evaluation of a training programme are given. Information about online trainings and a list of online tools are also provided. In the second part of the tool **experiences, lessons learned, and good practices** are shared, followed by some **examples of training programmes, workshops, and evaluation questions**. In the Appendix benchmarking of workshops and training materials based on different forms of Public-Private Cooperation² of the respected projects is given, as well as a list of training sessions topics implemented. This might help you when deciding what kind of a training programme you would like to develop and where to search for more detailed information.

2. IMPORTANCE OF TRAINING IN CULTURAL HERITAGE SECTOR

Nowadays, with fast development and changes in almost all fields of our lives - economic, social cultural and political, the long-life learning is a must for successful work. Professionally active persons need to constantly develop their own competencies: the soft ones, related to teamwork, planning and organization, the ability to adapt to external changing conditions, problem solving skills, networking as well as those related to the area of competence of our own activities. This is equally important for actors working in the cultural and creative industries (CCI), and for those in the cultural heritage (CH) sector, both sectors facing challenges due to lack of public financial resources. The economic situation in recent years has also reduced the opportunities for private sector engagement. Therefore, constant up-date about novelties can contribute to more effective day-to-day management (and financing) of heritage sites.

¹ This publication reflects the authors' view and the Interreg CENTRAL EUROPE programme authorities are not liable for any use that may be made of the information contained here.

² More information about Public-Private Cooperation in the ForHeritage document: The Use of Public-Private Cooperation Approach in Cultural Heritage Revitalisation, <https://www.interreg-central.eu/Content.Node/D.T1.2.3-PPC.pdf>

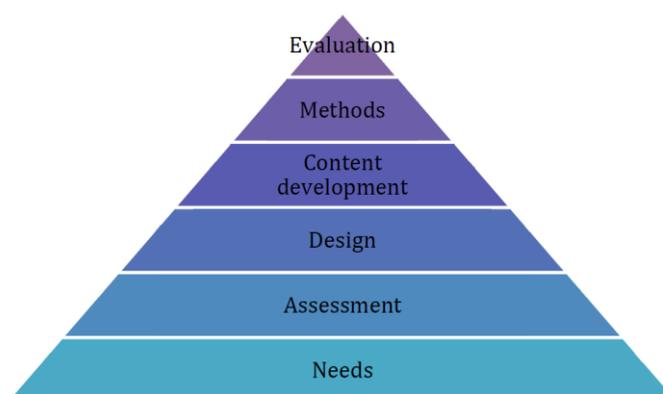


3. MAIN STAGES AND KEY ACTIVITIES FOR EFFICIENT PREPARATION, IMPLEMENTATION AND EVALUATION OF A TRAINING PROGRAMME

Based on the reviewed workshops and training materials some general activities were detected, therefore they can be regarded as a good example and the starting point for other organisers of cultural heritage management related trainings.

An organiser of training has to consider that each training programme is prepared for a specific local environment and specific needs with regard to contents or target groups. For an efficient training programme, several stages should be considered.

Figure 1: Hierarchy of the workshops structure’s basic features, where the bottom line is the starting point



Source: RESTAURA project: Deliverable D.T4.3.7- Workshop material documentation (transnational), version 3, March 2018

In literature several other possibilities, how to organise and implement a training workshop can be found. *Please see the chapter 7: Literature and sources, no. 4 and 14.*

A successful training programme depends not only on the quality of training provided, but also on the planning phase, therefore the whole process is divided in the following phases: (1) PRE-EVENT ACTIVITIES, (2) ACTIVITIES ON THE DAY, (3) POST EVENT ACTIVITIES.

3.1. PRE-EVENT ACTIVITIES

✓ **FORM AN ORGANISING TEAM and DRAW A TIMELINE**

The role of an organising team is to prepare the whole event. The size of the team depends on the size of the event.

A timeline needs to identify: all activities, individuals responsible and deadlines for completing each activity.



✓ INITIAL EXPECTATIONS

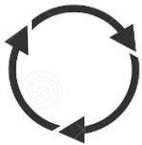
At this stage, the basic things of a training programme should be defined:

- objectives,
- themes that should be addressed,
- experts to be engaged - a text for trainers should be prepared,
- desired methods of work³ - also to be discussed with the chosen experts as well as with potential participants, if you decide to conduct a workshop group/focus group/interviews/online questionnaire,
- potential training group/s - training topics should be tailored for beginners and advanced learners,
- possible challenges and barriers,
- date and location of the training,
- budget (expenditure, income - if any).

Learning is a process of change that may cause a certain level of resistance. Tools to be used, supporting this process of change, should allow the participants to incorporate it into the activities of the training to acquire personal experiences.

Some studies have shown that adults retain:

100% of repeated actions



90% of what we do



70% of what we say



65% of what we write



50% of what we see and hear



30% of what we see



20% of what we hear



10% of what we read



³ Please see 3.2 - Activities on the day (Implementation of training activities) for more information.



✓ IDENTIFICATION OF TRAINING NEEDS

There are several tools that could be used to get input from potential participants or training group/s, such as an online questionnaire (tailored to the needs and challenges of different target groups), focus group/s, workshop groups or interviews. As we usually deal with one form of Public-Private Cooperation in cultural heritage management, it is important that needs of both sectors (public and private) are identified and later addressed in the training programme.

An example⁴: The main training needs identified related to a day-to-day management could be as following:

- business models/business plans/entrepreneurial activity start-ups
- knowledge of legislation and legal aspects of business of non-governmental organisation
- functioning
- fundraising, financing of cultural activities⁵
- incubation of a new venture, support for beginners and empowerment of initiatives
- social communication, marketing in culture, PR, advocacy, new media, and social media
- heritage management (heritage site management)
- legal and organisational conditions for the management of a heritage site (monument)
- networking, functioning in partnerships, non-hierarchical management models, design, and network models⁶
- task and project management in public administration
- human resources management (recruitment of specialists), team building
- management and development in the field of cultural tourism and heritage (cultural routes; cultural festivals and other products of cultural tourism).

During the working groups you can ask participants not only about themes to be addressed in a training programme, but also about suggested training solutions for their challenges, their experiences (good and/or bad) with trainings they have attended - what worked well etc.

✓ DEFINITION OF TRAINING GOALS

In this stage expected outcomes of the training implementation should be defined. It should be clear to participants (to all target groups) what knowledge and which skills they may obtain, but also how they can act better after they complete the training.

✓ TRAINING PROGRAMME DEVELOPMENT

Once the goals are defined, specific training solutions and methods should be chosen based on contents, arisen needs/preferences of target groups and foreseen number of participants.

⁴ Forget Heritage project: Deliverable D.T2.2.1 - Transnational Training Model for Historical Sites Management, May 2018

⁵ More information about funding in the ForHeritage document: Financial Instruments and Innovative Financial Schemes for Cultural Heritage, <https://www.interreg-central.eu/Content.Node/D.T1.2.4-Financial-instruments.pdf>

⁶ More information about involving various stakeholders and different forms of cooperation in the ForHeritage document: Cultural Heritage Participatory Governance Toolkit, <https://www.interreg-central.eu/Content.Node/D.T1.2.1-GG-and-PG.pdf>



Based on these parameters the maximum number of participants can vary between up to 15 (workshops with active involvement of attendees) to up to 30 persons (when no active role of participants is foreseen - transfer of knowledge).

A suggestion⁷: use one template for all training sessions. Ask trainers to include all important information, such as objectives of the session, training methods, materials and a scenario for the session, duration, potential risks, and challenges.

Figure 2: An example of a template for setting up a training session’s goals, methods and training tools (prepared within the Forget Heritage project)

| | |
|---|--|
| Title of a training session: | |
| Trainers: | |
| Duration: | |
| Date(s) of training session: | |
| Venue (address): | |
| Methods and training tools that will be used: | |
| Type of participants (for whom) | |
| Public administration: | |
| CCI operators: | |
| Pilot Managers: | |
| A short description of the training session (objective, scope, planned outcomes): | |
| Additional comments (non-obligatory): | |

When preparing a training programme, you can decide either for separate sessions or for a modular approach. If the later, then the training should last at maximum up to three days. It is also recommended that each module has independent sessions, as this allows participants to choose one or more sessions from various modules - according to their needs and level of knowledge.

✓ **PROMOTION OF A TRAINING PROGRAMME**

Promotion will depend on the event itself (e.g. only one-day workshop, several sessions in a longer period), target groups you want to reach as well as on the available budget. It can vary

⁷ Forget Heritage project: Deliverable D.T2.2.1 - Transnational Training Model for Historical Sites Management, May 2018



from invitations sent to potential participants by e-mail and developing a website/web subpage for the event to developing posters, flyers, advertising, etc.

The invitation needs to contain all information about the training programme (what, where, when, for who, deadline for registration, fee - if any). A registration form or a link to the online registration should be also included.

✓ TRAINING MATERIALS

Depending on target groups, available budget, and a form of trainings (on a location or online) training materials are prepared. It could be simple copies or a training brochure, in case of online trainings pdf documents and/or presentations' handouts.

✓ INSTRUCTORS, MENTORS, TRAINERS

Success of a training programme and each session largely depends on the chosen trainers. They need to have good knowledge and experiences in the field of their expertise, be able to present topics in an attractive and engaging way and use modern training tools. It is recommended that trainers are familiar with previously developed documents in a project, if the training session is related to them, so that they can just continue (and upgrade) the activities and not to start from the beginning.

✓ EQUIPMENT NEEDED

In accordance with trainers prepare a list of equipment that will be needed. The equipment may include computers (check if internet connection is needed), projectors (ppt, overhead), screen & pointer, microphones, perhaps video camera. Besides, other materials can also be used: white- & blackboard, pens & paper, flip chart & markers, post-it notes etc.

✓ EVALUATION⁸

Decide on which method and tool you will use for evaluating a training session and/or programme. Based on your local needs a decision will be made and a corresponding evaluation form prepared. *Please see points 3.3 Post Event Activities and 6.3 Training Evaluation for more.*

3.2. ACTIVITIES ON THE DAY

✓ SET UP THE VENUE

Preparation of a training room, training materials for participants and a list of participants, checking the equipment on time means a good and smooth start of the training process.

✓ IMPLEMENTATION OF TRAINING ACTIVITIES

⁸ Please see 3.3 Post event Activities (Evaluation) for more information.

According to the pre-agreed methods of work, the training process will be carried on. However, as training is a dynamic process, it is important to be flexible and ready for changes on the spot. There are various methods of work that could be used depending on the purpose of the training⁹:

- **Transfer of knowledge** - useful when participants require introducing/general preparation for a specific challenge/issue (e.g. lectures, presentations, study visits at partners etc.)
- **Involvement of participants** - useful when participants need closer cooperation, when the goals include teambuilding and empowerment (e.g. discussion in subgroups, mini-seminars & debates, brainstorming, practical workshops, presentations of good practices, case-study analyses etc.)
- **Initiation of change processes** - useful in the case of professionals or individuals jointly involved in an undertaking or when participants have to generate solutions and ideas themselves, based on activities focused on preparation of an adequate educational situation by a trainer (e.g. moderated working teamwork - solving tasks, interpersonal training, before-action review and after-action review, coaching, mentoring etc.).

Key points in choosing a proper training method for adult learners:

- They are goal-oriented, coming with existing knowledge, experiences, and expectations, mostly project oriented (not much time).
- They want the training to be relevant, and task oriented.
- Often, they have bad experiences with previous training programmes.

✓ PHOTO DOCUMENTATION OF THE EVENT



Photos 1, 2: Workshops within the Forget Heritage project, Ljubljana, 2018. Source: Archive of RRA LUR

⁹ Forget Heritage project: Deliverable D.T2.2.1 - Transnational Training Model for Historical Sites Management, May 2018, page 20



3.3. POST EVENT ACTIVITIES

✓ EVALUATION

Evaluation of each training session and of the entire training process is necessary to understand what could be improved in the future. It should be done with everyone involved in any phases of the training session - (1) your organizing team, (2) participants and (3) trainers.

- (1) Organizing team: A follow-up discussion should be done soon after the training event, while the information is still fresh in your minds. You should find out what went well and what could be improved in future trainings and how.
- (2) Participants: Depending on your needs you can choose the corresponding method and tool for the evaluation of the training session/programme. It could be either an evaluation form that is handed out immediately after each session and/or at the end of the event, it could be sent by e-mail, or you can have interviews with the participants or a group discussion about the results. Questions may be related to the content, methodology, perhaps the venue, space may be given for additional comments. (Did the training programme meet your expectations? Knowledge received? Better skills? Most/least effective topic/presentation/activity and why? What could be improved in future trainings?).
- (3) Trainers: It is recommended to evaluate the training session/programme also with trainers and other persons involved.

Comparison of views of various groups can give you useful starting points for improvements and/or necessary changes in your next training sessions/programmes.

4. ONLINE TRAINING

Faced with a new world-wide situation in 2020 and consequently due to the known restrictions several activities in our daily life are moving online, where possible, as a temporary substitute for physical meetings. And that is valid also for training activities. Here you can find some suggestions and hints, how to effectively organise your online training sessions.

On 25 March 2020, the Interreg Europe programme organised a webinar¹⁰ “Tips on running online events.” Almost 400 participants joined the online webinar and as it is shown below (photo 3), 60% of listeners had experiences with online meetings/events only as a participant and only 30% as an online meeting(s) organiser, therefore it might be valuable for you to consult the proposals given by the Joint Secretariat of the Interreg Europe programme on the following themes:

- Online events: a webinar vs. an online meeting and their specifics - in size of audience, interaction etc. (photos 4 - 11).
- Recommendations are given about duration of an event, organisation and efficiency, rules.

¹⁰ <https://www.interregeurope.eu/news-and-events/news/8119/watch-our-webinar-on-online-meetings/>



- Guidance on running webinars, e.g. key messages, roles of your organizing team, interaction and engagement, presentations, and social media communication.
- At the end tips on online tools and technical issues are provided. A list of possible tools¹¹ for online meetings and webinars, collaboration work and interactivity with all important data (description, price, and websites) is also available.

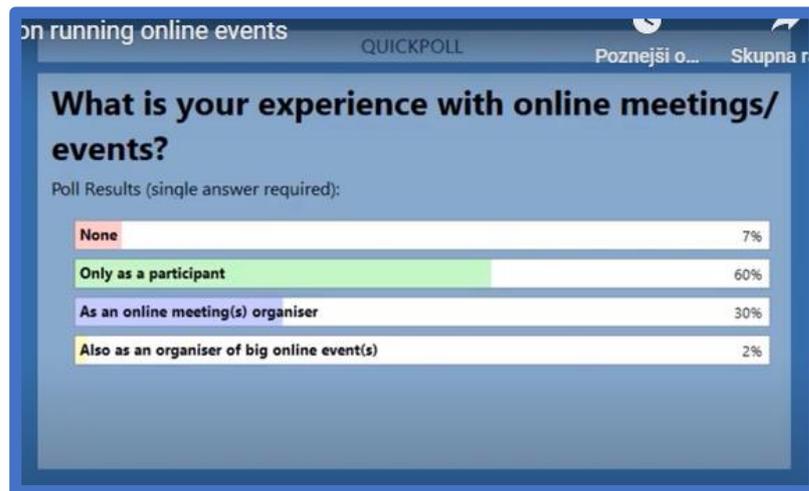


Photo 3: Poll at the Interreg Europe webinar, 25 March 2020



Photo 4: Difference between a webinar and an online meeting



Photo 5: Online meeting - smaller groups and the same rights

¹¹ https://docs.google.com/spreadsheets/d/12v88UF5f04eRmhRJlwaW8xtkV2q_tAAcNljO6GOhtpo/edit#gid=0



Photo 6: Tips for an effective online meeting



Photo 7: Rules needed for an online meeting



Photo 8: The webinar design in 5 steps



Photo 9: Tips for an effective online webinar

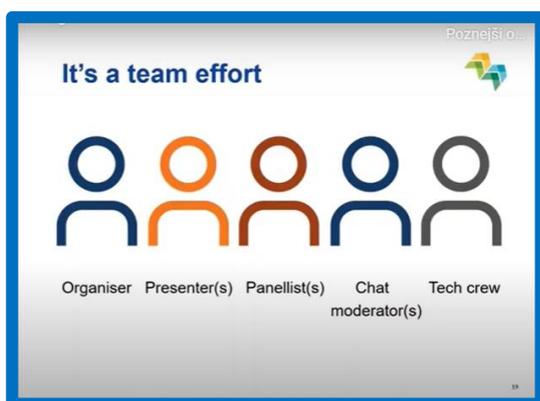


Photo 10: The webinar team

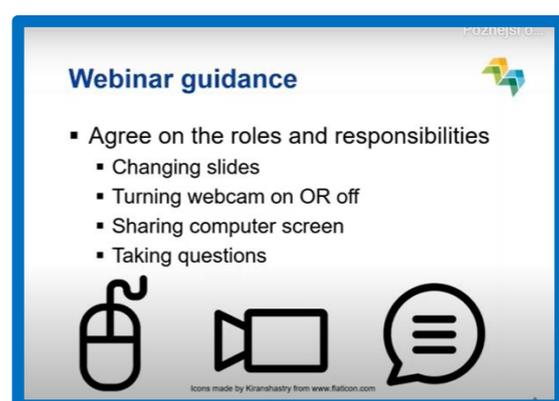


Photo 11: The webinar team and its tasks

On 12 May 2020¹², another webinar on “Project meetings online” was held with practical experiences in using online tools in stakeholder meetings, how to transfer physical project learning event into online (e.g. webinars, final events), about challenges and opportunities using some

¹²https://www.interregeurope.eu/news-and-events/news/8523/tips-for-your-next-online-project-meeting/?no_cache=1&cHash=74565d50df57bc2ed7b996b624f1cd01



online tools (e.g. Zoom, Webex, MS Teams) and useful tips to run a successful online event. One of the presenters shared questions that need to be answered in order to make it easier to decide on the most appropriate tool (photo 7). A list of online tools¹³ with their description, features, pros and cons and websites was also prepared.

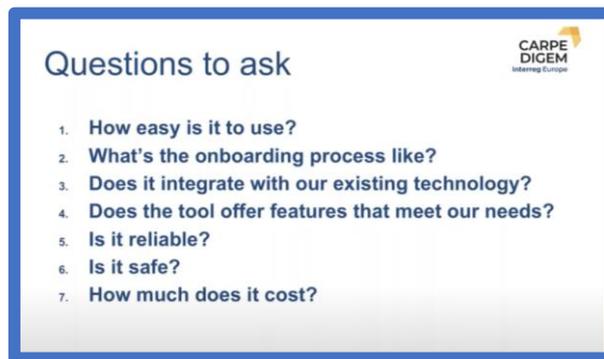


Photo 7: Questions to be answered

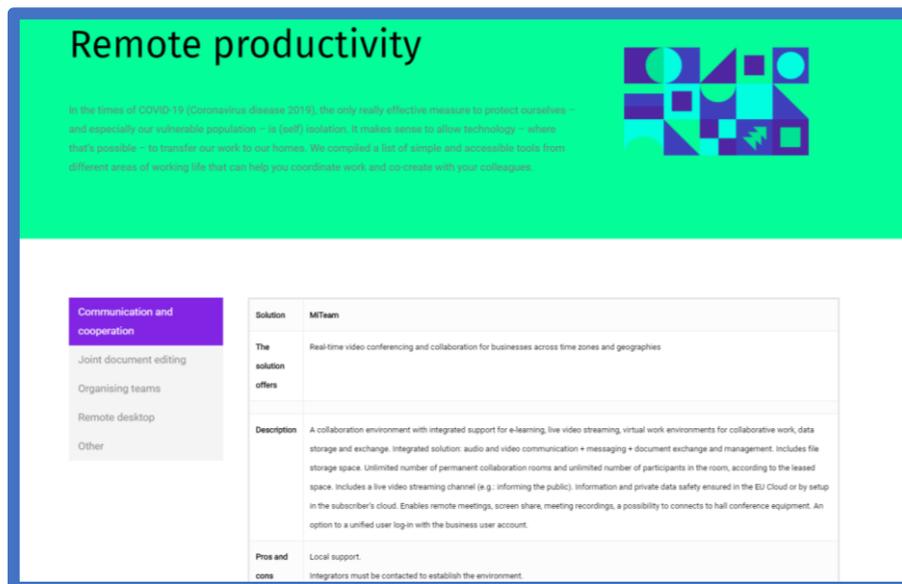


Photo 8: A list of online tools prepared by the University of Ljubljana, Faculty of Electrical Engineering, a partner in the CARPE DIGEM project, <https://4pdih.com/en/remote-productivity/> (May 2020)

Interreg Central Europe programme also prepared information about [virtual events](#)¹⁴: Tips and inspirations for going digital.

¹³ <https://4pdih.com/en/remote-productivity/>

¹⁴ <https://www.interreg-central.eu/Content.Node/events/Virtualevents.html>



5. GOOD PRACTICES AND LESSONS LEARNED

5.1. GOOD PRACTICES

Our proposal of good practices is mostly given based on the overviewed documents, for the training sessions implemented in Ljubljana (June 2018) hands-on experiences are shared.

GOOD PRACTICES:

- ✓ Trainings need to be led by professionals in their field

The practitioner with many years of experiences in the fields of conservation, renovation of cultural heritage buildings, with knowledge of all phases and necessary processes before-, during- and post-revitalisation is a very precious speaker.

(A concrete example) Trainings led by an experienced senior practitioner from a municipality had an excellent response of participants. Although those training sessions were primary meant for PA staff, also CCI actors and operators attended them with great interest, as there was a possibility to hear each other's needs and challenges. Besides, all participants had a chance to visit two buildings - one that was just renovated and another one that had been waiting for renovation - and hear experiences with the complex processes of renovation and a step-by-step procedure that was ahead of the secondly mentioned cultural heritage site.

- ✓ Organisation of modular trainings

A modular approach with several sessions per module provides more flexibility to participants. More advanced trainees could attend only those sessions that brought them new knowledge.

- ✓ Beginner and advanced level of trainings

Beginners need general information and a lot of practical, but well-structured knowledge about heritage sites management and how to push actions forward, while experienced CCI operators and managers need more specific knowledge and solutions to their challenges.

- ✓ Combination of theory and practice

A combination of theoretical introduction with many practical information, inspiring examples presented, and good/bad practices followed by a "questions and answers" part of the training, where participants directly interacted with trainers.

LESS IN FAVOUR:

- ✓ Timing of training sessions

Organisers of training sessions should avoid a month before the holiday season, e.g. June, as public and private sectors and NGOs would like to conclude their activities before holidays. Furthermore, in some countries employees in the public sector need to spend days of unused



leave from the previous year till the end of June, therefore there are less possibilities to attend several training sessions, despite their very good contents. The organiser should also check if major events in the industry/sector may be organized.

✓ A great fear of applying Public-Private Partnership (PPP)

The fear of PPP still exists in local communities/municipalities. It is a political issue of decision makers. Therefore, further work on PPP in the CH sector and revitalisations projects should focus on de-stigmatization of PPP as a corruptive activity. De-stigmatization could be also done through training sessions => gaining more knowledge about the topic.

5.2. LESSONS LEARNED

Based on the analysed projects documents the **common denominator** is the following:

✓ Awareness raising about PPP

There is a need for raising awareness about beneficial potentials of PPP in the CH and CCI among public and private sector. (One has to pay attention to preparation and signing of really sound contracts, as both sectors by nature pursue different goals.)

As the projects, mentioned in the Introduction, dealt with one of the PPC forms, the issues of PPP raised during the lifetime of those projects, e.g. in pilot projects¹⁵. Therefore, at training sessions an emphasise should be given to introduction of PPP policy - legal and economic issues with some national cases, images, and explanations, if you have a similar type of a (pilot) project. Please keep in mind that transnational cooperation and sharing of experiences can be a great benefit; however, they need to be adapted to local (legal) environment.

✓ Initial and advanced level of training

Training topics should be tailored for beginners and advanced learners. Wording/language and approach should also be adjusted to the target learners.

It is more important to have the above-mentioned levels of training than tailored ones by target groups. Namely, PA staff, CCI operators and Pilot Managers showed their interest for all workshops, not only for the ones specially designed for them. It was a great and valuable experience, as they learned about each other's "language" and got a deeper understanding of needs of other groups.

✓ Instructors - professionals in their field

¹⁵ More information about pilot projects in the ForHeritage document: Transferable Elements of Cultural Heritage Revitalization Pilot Projects, <https://www.interreg-central.eu/Content.Node/D.T1.2.2-Pilot-projects.pdf>



Workshops/training sessions need to be led by instructors who are professionals in their field, and who also know how to bring topics closer to the target groups. Limited presence of theoretical experts in favour of practitioners, presenting real (day-to-day) cases.

Having a good team of experts from different fields is crucial, as participants have then possibilities to go deeper in details with various instructors. Furthermore, it is crucial to tackle a quite complete array of topics of day-to-day management of CH sites, useful to set the basis for future entrepreneurship activities.

As CH sector has been facing challenges due to lack of public and private resources, training sessions on financial instruments¹⁶ would be very relevant and highly appreciated by various stakeholder groups. Although challenging, it is important to build common terminology, share the same meaning and to facilitate a dialogue between PA and financial intermediaries, if you include the later in the training programme.

✓ Importance of measuring impact

Measuring of impact is an important question, as various stakeholders would like to know to what degree a certain action/project/pilot project affects changes in the society, respectively generates economic and/or social benefits.

A ForHeritage tool about impact assessment¹⁷ aims at providing some guidelines to measuring of impact of CH projects, as the expected impact is also related to financial aspects and attractions of investors to sustain the projects. The tool answers the following questions: What?, Why?, How?, Who? and When?

¹⁶ More information about finances in the ForHeritage document: Financial Instruments and Innovative Financial Schemes for Cultural Heritage, <https://www.interreg-central.eu/Content.Node/D.T1.2.4-Financial-instruments.pdf>

¹⁷ More information about assessment of impact in the ForHeritage document: Impact Assessment of Cultural Heritage Projects, <https://www.interreg-central.eu/Content.Node/D.T1.2.6-Impact-assessment.pdf>



6. STRUCTURE OF TRAININGS, AGENDA, TRAINING EVALUATION - EXAMPLES AND PRACTICAL TIPS

6.1. STRUCTURE OF TRAININGS

In RESTAURA, FORGET HERITAGE and IFISE several types of trainings were used in form of:

- ✓ Practical workshops and exercises
- ✓ Lectures / presentations with discussion
- ✓ Analysis of case studies or good practices
- ✓ Brainstorms / group conceptual work
- ✓ Study visits
- ✓ Consulting and coaching

Table 1: An example of a workshop structure:

| STRUCTURE OF THE WORKSHOP | | |
|---------------------------|--|--|
| 09:00-09:15 | Registration | |
| 09:15- 09:30 | Welcome | Introduction to the Restaura project and the project partners |
| 09:30-11:00 | Status and legal framework of PPP | One (or two) speaker from public or private sector Basic presentation of PPP model in IBHRP+ case study |
| 11:15-11:30 | Coffee break | |
| 11:30-13:00 | Economic and financial aspects of PPP | One (or two) speaker from public or private sector + case study |
| 13:00-13:00 | Lunch | |
| 14:00-14:20 | Public aspects of protecting cultural heritage | |
| 14:20-14:40 | Presentation of possible funds for implementing PPP in cultural heritage (i.e. EU Funds, national investment banks, private investors, etc.) | |
| 14:40-15:10 | Introduction to the web-based tool (basic presentation of key functionalities, practical simulation of the Helpdesk, etc.) | Either personally or through a Skype call, where the vendor presents the tool and explains how to use it |
| 15:10-15:15 | Closing | |
| 15:15-15:30 | Evaluation | Filling in the questionnaires |

Source: RESTAURA project: Deliverable D.T4.3.7 - Workshop material documentation (transnational), version 3, March 2018



Table 2: An example of a 3-day-long training programme

| TABLE 5: TRAINING PROGRAMME EXAMPLE | |
|--|---|
| <p>1st day of training session Public administration and historical sites managers</p> | <p>Session 1 Conceptual meeting of trainers, coordinators, and experts (combining project activities, pilot projects and a training program).</p> <p>Session 2 Creating and managing integrated urban programs aimed at social revitalisation, heritage protection, development of entrepreneurship in the field of culture and creative industries.</p> |
| <p>2nd day of training session Local initiative groups and a wide team of people involved in the Public Private Cooperation for the management of historical facilities, individuals looking for knowledge development in the topic</p> | <p>Session 3 A lecture/debate opening the training session day held by a recognised expert.</p> <p>Session 4 Open space: valorisation of cultural heritage in the context of the possibility of its use in contemporary cultural circuits.</p> <p>Parallel sessions 5 and 6 A workshop using the Design Thinking Method in connection with the development of the main issues related to the Public Private Cooperation for the management of historical facilities / Placemaking Method Workshop in connection with the preparation of activities.</p> <p>Session 7 Group analyses of good practices with invited guest experts (a local project analysis; external practice analysis).</p> <p>Session 8 Heritage management (heritage site management) - a training session for a group of coordinators responsible for the implementation of the Public Private Cooperation for the management of historical facilities project and key stakeholders (public administration, environmental institutions, and partners).</p> |
| <p>3rd day of training session Specific individuals and organisations wanting to broaden their knowledge of creative industries development and activities within heritage resources</p> | <p>Parallel sessions 9 and 10 Incubation of a new venture, support for beginners and empowerment of initiatives and Business Models/business plans/building an entrepreneurial activity start strategy.</p> <p>Parallel sessions 11 and 12 Development of products with the use of heritage resources; promotion and marketing of a new venue - a creative centre / fab-lab/ centre of art/ culture.</p> |

Source: Forget Heritage project: Deliverable D.T2.2.1 - Transnational Training Model for Historical Sites Management, May 2018



Table 3: An example of a modular training programme

Training Module 1 - Social Impact Investing: Combining Social Results with Financial Returns

| DAY | MACROTHEMATIC | TOPICS |
|---------------------|---|--|
| Day 1 (half-day) | Knowing the Impact Investing Ecosystem | <ul style="list-style-type: none"> Glossary Social innovation in the Public Administration Key players and instruments for Public Administration The legal framework for social economy (parallel sessions for Spanish and Italians participants) |
| Day 2 | Shaping Investors' approach to the deal | <ul style="list-style-type: none"> Defining the investor's position in the impact investing map Social Impact Assessment and the practice in Impact Investing |
| Day 3 | Implementing and managing impact investment | <ul style="list-style-type: none"> Impact finance for intermediate bodies: which possibilities in the impact investment ecosystem? The European framework for social finance The investment process: deals, sourcing, due diligence, and management |
| Day 4 (half-day) | Challenges and opportunities on the ground | <ul style="list-style-type: none"> Case History 1: public investors Case History 2: social incubator Case History 3: Impact fund |

Source for all training modules (1-4): IFISE project: Deliverable D.T2.1 - Definition of a replicable training scheme for capacity building, addressed to Managing Authorities and Intermediate Bodies, for the Implementation of innovative FIs for the Social Economy, 2019

Training Module 2 - Innovative Use of FIs for Social Economy: Equity, venture, and hybrid instruments

| MODULE 2 | | |
|---------------------|--|--|
| DAY | MACROTHEMATIC | MAIN TOPICS |
| Day 1 (half-day) | Impact Investing in practice | <ul style="list-style-type: none"> Hands-on experience from a start-up and an impact fund manager |
| Day 2 | The European approach to FIs and Impact Investing Equity fund | <ul style="list-style-type: none"> The role and instrument of EIB Equity and Funds the EIF perspective Equity socially oriented |
| Day 3 (half-day) | Venture Funds Innovative practice within ESIF | <ul style="list-style-type: none"> Venture capital to promote SMEs growth Case study on financial instrument for self-employment (Lithuania under ESF funds) |

Training Module 3 - Social Innovative Financial Instruments (New FIs)

| MODULE 3 | | |
|---------------------|---|--|
| DAY | MACROTHEMATIC | MAIN TOPICS |
| Day 1 (half-day) | Financial Instrument for social purpose | <ul style="list-style-type: none"> The role of microcredit and real case impact project |



| | | |
|---------------------|---|---|
| Day 2 | Outcome based instrument Public instrument for social impact | <ul style="list-style-type: none"> • SIB: the experience of a practitioner and the perspective of the European institution • Equity crowdfunding • Public instrument for social finance: experience from ESF |
| Day 3 (half-day) | Legal framework EASI | <ul style="list-style-type: none"> • Public and private law for FIs in the ESIF regulations Financial tool: EASI guarantee |

Training Module 4 - State aid regulation and financial instruments under ERDF and ESF

| DAY | MACROTHERMATIC | MAIN TOPICS |
|-------|---|--|
| Day 1 | Introduction to state aids FIs with social impact | <ul style="list-style-type: none"> • Key condition for state aids • The lifecycle of FIs • The case of Social Impact Fund in Sardinia |
| Day 2 | State aids in practice | <ul style="list-style-type: none"> • State aids at different level • Market test • Service of general interest (focus on social services) • Calculating State aids • Focus on guarantee |
| Day 3 | State aids compliance | <ul style="list-style-type: none"> • Different form of compliance • Case study • Interactive working group on real case of socially oriented equity and quasi-equity in different member states |

6.2. AGENDA

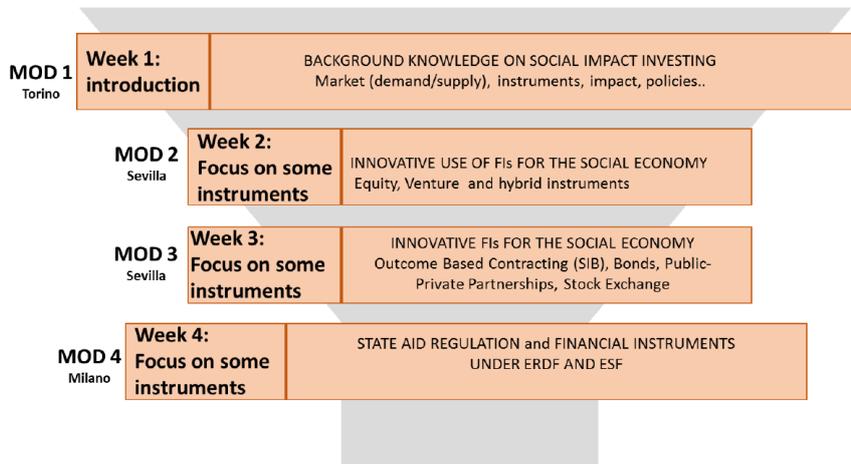
In the IFISE project four (4) main modules were identified. Each module had separate, independent sessions.

A modular approach allows participants to choose one or more sessions of various modules or a module or two, according to their needs and level of knowledge. It also allows to redesign the duration and/or sessions of training, depending on your budget and/or specific needs.

Figure 3: Training Agenda - Topics and weeks/modules



TRAINING AGENDA: TOPICS AND WEEKS/MODULES



Source: IFISE project: Deliverable D.T2.1 - Definition of a replicable training scheme for capacity building, addressed to Managing Authorities and Intermediate Bodies, for the Implementation of innovative FIs for the Social Economy, 2019

6.3. TRAINING EVALUATION

If you want to get important information about each training from participants, an evaluation form should contain questions about the content and methodology. It is good to give them space also for additional comments, perhaps also about the venue/catering/organisation of the training.

Below you will find an example listing relevant questions for participants and also trainers to get their feedback after the end of the training.

Table 4: Main issues relevant to the training evaluation

| Table 8: MAIN ISSUES RELEVANT TO THE TRAINING EVALUATION | |
|---|--|
| Participants' reaction to the training | <ul style="list-style-type: none"> · How do the participants evaluate the training? · Was it carried out efficiently? · What is the opinion of the participants about the trainers? · How do participants assess the usefulness of the training? · Strengths and weaknesses of training in the participants' opinion. |
| Learning outcomes - knowledge and skills (acquired competences) | <ul style="list-style-type: none"> · What knowledge and skills have been mastered by the participants of the training? · Do the training participants assess the practical dimension of the training positively in terms of their tasks, challenges, and planned activities? |



| | |
|--|--|
| Assessment of the implementation of acquired competences (results in action) | <ul style="list-style-type: none"> Do the training participants use the competences acquired during the training in their practical activities related to the implementation of an undertaking/ project? |
| Trainer's evaluation | <ul style="list-style-type: none"> What changes can be made to the training program? What was a good solution and what turned out to be ineffective or problematic? What is the trainer's opinion about the training group? |

Source: Forget Heritage project: Deliverable D.T2.2.1 - Transnational Training Model for Historical Sites Management, May 2018

6.4. PRACTICAL TIPS

As we want to make the organisation of training sessions easier for you, here are some practical tips. They are valid regardless the chosen approach or training duration.

Table 5: Practical Tips when choosing a modular approach

| | |
|---------------------------|--|
| FORMAT | Stand-alone modules The use of stand-alone interlinked modules allows a deep dive into the thematic and a greater flexibility to the participants to customize the training according to their background knowledge and interest. |
| SCHEDULE | Min 2 days by Module Max 3 days by Module |
| PARTICIPANTS | 15-25 max |
| LOCATION | <ul style="list-style-type: none"> U-shaped room or round tables to foster interaction and allow parallel workshops too. Projector. Blackboard. Wi-Fi. |
| TRAINING PROVIDERS | The selected providers for the training should have the three following main characteristics: <ul style="list-style-type: none"> Experience in delivering training and courses. Knowledge of the different aspects and players within the identified thematic (see the box below); Possibility to activate international speakers of its network. During the training, the providers should envision an in-class tutor -to connect the different interventions and wrap-up the main takeouts. |



| | |
|------------------------|---|
| <p>SPEAKERS</p> | <p>Different profile of speakers should be envisaged according to the modules content:</p> <ul style="list-style-type: none"> • 1 or more experts (from academic or relevant public/private institutions) to set the scene and discuss the context. • practitioners, based on modules' contents (see box below), in particular: <ul style="list-style-type: none"> ○ Social Impact Investing: practitioners who work as intermediaries in different stages of the impact investing ecosystem discussing real methods and also analysing case histories. ○ Financial Instruments: practitioners from supply/demand side and from financial intermediaries/investors. ○ State aid: practitioners from institutions' legal office; managing Authorities and their consultants. • “testimonials” presenting their own case histories. • Representatives from European and International Financial Institution. |
| <p>FOCUS</p> | <p>Combine two dimensions:</p> |
| | <ul style="list-style-type: none"> • International to provide inspiration and networking at a broader level • national and regional, to provide insights for implementing suitable FIs better aligned with local context |
| <p>APPROACH</p> | <p>Hands-on, with workshops and a real-life attitude.</p> <p>The use of advanced facilitation formats and technique (such as: instructor led training the World Café; Role-Play) are suggested to enhance interaction, maximise results, collect all outputs, and report results in structured documents. In particular, the role-play is helpful if participants need to understand the point of view of particular actors involved in the implementation of Financial instruments (financial intermediaries, managing authorities). This type of groupwork typically sees alternate explanatory moments, with the role-play group exercises, that can be realised with the help of printed materials</p> <p><u>Instructor - Led Training</u> - practice of training and learning material between an instructor and learners, either individuals or groups. Instructors also assumed the role as facilitator, knowledgeable and experienced in the learning material, but also with high ability to deliver material to learners.</p> <p>Instructors delivered training in a classroom format as an interactive workshop</p> <p>World Café and Knowledge Café help the whole audience to focus on 2 to 5 specific themes: all participants will discuss and found solutions for the same issues by working in groups for 2 to 5 rounds, discussing 2 to 5 pre -determined questions/themes. This could be useful to get a deeper understanding of multifaceted thematic such as impact investing.</p> |

Source: IFISE project: Deliverable D.T2.1 - Definition of a replicable training scheme for capacity building, addressed to Managing Authorities and Intermediate Bodies, for the Implementation of innovative FIs for the Social Economy, 2019



7. LITERATURE AND SOURCES

1. Definition of a replicable training scheme for capacity building, addressed to Managing Authorities and Intermediate Bodies, for the Implementation of innovative FIs for the Social Economy (2019); <https://www.finpiemonte.it/Ifise-project/ifise-project-deliverables>
2. European Union, FI-Compass MRA initiative: IFISE project; <https://www.finpiemonte.it/Ifise-project>
3. ForHeritage tools, Interreg Central Europe: <https://www.interreg-central.eu/Content.Node/ForHeritage.html>
4. Guidelines for transnational project partners meetings (D.T4.1.1, v.2, 2017; O.T4.1), Interreg Central Europe: RESTAURA; <https://www.interreg-central.eu/Content.Node/RESTAURA.html> (internal doc)
5. International Council on Archives, Section of Records Management and Archival Professional Associations (2010): Organising Training Workshops and Seminars: Guidelines for Professional Associations
6. Interreg Central Europe, FORGET HERITAGE project; <http://www.forgetheritage.eu>
7. Interreg Central Europe: RESTAURA project; <https://www.interreg-central.eu/Content.Node/RESTAURA.html>
8. Interreg Central Europe: Virtual Events - Tips and inspirations for going digital; <https://www.interreg-central.eu/Content.Node/events/Virtualevents.html>
9. Interreg Europe: webinar Tips on running online events (25 March 2020), <https://www.interregeurope.eu/news-and-events/news/8119/watch-our-webinar-on-online-meetings/>
10. Interreg Europe: webinar Project meeting online, Tips for your next online meeting (12 May 2020); https://www.interregeurope.eu/news-and-events/news/8523/tips-for-your-next-online-project-meeting/?no_cache=1&cHash=74565d50df57bc2ed7b996b624f1cd01
11. Interreg Europe: List of online tools used by Interreg Europe project partners (updated on 24 March 2020), https://docs.google.com/spreadsheets/d/12v88UF5fO4eRmhRJlwaW8xtkV2q_tAAcNljO6GOhttp/edit#gid=0



12. Kavaš D., Murovec N. (2016): Methodological Guidelines for Collection of Best Practices (D.T1.1.1), Interreg: Central Europe, FORGET HERITAGE; Transnational Public-Private-Partnership Concept (2011) mentioned (internal doc)
13. Methodological Guidelines for Collection of data for training needs assessment (D.T2.1.1) and Reports on local training needs (D.T2.1.2), Interreg: Central Europe, FORGET HERITAGE (internal doc)
14. Output factsheet: Training (O.T4.1., 2019; HR, SK, SL, PL), Interreg: Central Europe: RESTAURA; <https://www.interreg-central.eu/Content.Node/RESTAURA.html> (internal doc)
15. Reina C.C., Ortiz R.G.A., Unger B. (2003, English translation 2005): Organising and Running Workshops, A Practical Guide for Trainers
16. Set-up of an in-class training addressed to project partners (D.2.2, 2019), European Union, FI-Compass MRA initiative: IFISE project (internal doc)
17. Transnational Report on Common Training Needs (D.T2.1.3, v.2, 2018), Interreg: Central Europe, FORGET HERITAGE
18. Transnational Training Model for historical sites management (D.T2.2.1, 2018; O.T2.2.1), Interreg: Central Europe, FORGET HERITAGE; <https://www.interreg-central.eu/Content.Node/Forget-Heritage/Transnational-Training-D.T2.2.1-eng.pdf>
19. Workshop material documentation (D.T4.3.7, v.3, 2018; transnational; O.T4.1), Interreg: Central Europe: RESTAURA; <https://www.interreg-central.eu/Content.Node/RESTAURA.html> (internal doc)



8. APPENDIX

8.1. BENCHMARKING OF WORKSHOPS AND TRAINING MATERIALS

The below table might help you before you start organising a training session. You can get some insight about relevant issues, such as: different forms of Public-Private Cooperation, aims, contents (soft part/programmes/day-to-day management; infrastructure/renovation) and target groups.

Table 6: Benchmarking workshops and training materials

| Analysed project / WSs & training materials | RESTAURA ¹⁸ | FORGET HERITAGE ¹⁹ | IFISE ²⁰ |
|---|--|---|---|
| Area of comparison | | | |
| Different forms of Public-Private Cooperation (main emphasis in the project) | PPP => financial model (revitalisation of cultural heritage sites => step by step) | PPC => management model (contents => a 3-year-long programme of cultural heritage site; only a minor part for infrastructural works) | PPP => financial model (implementation of innovative financial instruments - FIs - for the social economy => how to use them or how to reshape more consolidated modalities with a view of generating a social benefit) |
| Target users (for who?) | For public sector: local public authorities (mainly municipalities) | For public and private sector, as well as NGOs: PA staff (owners of CH buildings), CCI operators and Pilot (day-to-day) Managers | For public sector: Managing Authorities (MA) and Intermediate Bodies (IM) (participants were also experts with innovation & competitiveness background, experts in designing & implementing financial instruments, and regional policy makers) |
| The main aims of a workshop / training session | <ul style="list-style-type: none"> ▪ Gain in depth knowledge of PPPs to better develop policy frameworks and manage projects. ▪ Be armed with multiple, concrete examples of | <ul style="list-style-type: none"> ▪ Improvement of managerial skills & capacities of both sectors for the sustainable use of the cultural heritage. | <ul style="list-style-type: none"> ▪ To provide an overview on the panorama of financial instruments that could be applied to the social economy sector. |

¹⁸ More info about the project: <https://www.interreg-central.eu/Content.Node/RESTAURA.html>

¹⁹ More info about the project: <http://www.forgetheritage.eu>

²⁰ More info about the project: <https://www.finpiemonte.it/lfise-project>



| | | | |
|--|--|--|--|
| | <p>projects and how to maximize their success while addressing problems that might cause them to fail.</p> <ul style="list-style-type: none"> Gain specific tools and strategies for reforming local, regional, national institutions to facilitate PPPs in their home countries. | <ul style="list-style-type: none"> Creating new skills to allow the CCI operators to revitalise historical abandoned buildings & to run them more efficiently. Supporting competitiveness & employment, at the regional & local levels, and helping in strategic planning of professional development for staff in line with individual needs & organisational objectives. | <ul style="list-style-type: none"> To contribute to development of a practical feasibility analysis in the IFISE partner regions, for the set-up of some innovative instruments (e.g. a social Impact Bond & an Impact Investment Fund) specifically with the use of Structural Funds. To increase the offer of Financial Instruments (FIs) to the actors in the wide field of Social Economy, that (normally) have limited access to the FIs offered by private banks, using public funding to leverage private funds & taking social impact parameters as a reference point. |
| Main topics of training sessions | <p>What is PPP? Where can owners of cultural heritage sites get funds for revitalisation? How to use PPP approach in heritage revitalisation?</p> | <p>Where to get funds for: (1) the implementation of programmes in CH buildings, (2) maintenance of buildings, (3) adaptation of the interior of buildings to the needs of the programme. Furthermore, legal issues, CH and HR management, marketing, communication with various stakeholders, promotion...</p> | <p>Building of competencies needed to develop feasibility analysis or innovative FIs under ESIF regulation.</p> |
| Preparation - steps leading to a training programme/ structure of a workshop | <ol style="list-style-type: none"> (Legal and/or financial) Needs of both sectors Assessment (status and legal framework, economic and financial aspects of PPP etc.) Design Content development Methods Evaluation | <ol style="list-style-type: none"> Training needs diagnosis: an on-line questionnaire (for PA staff & CCI operators) A focus group(s) - discussion with PA & CCI operators Identification of local needs (based on the above two steps, templates available) Tailor-made training programmes for 3 target groups Evaluation of each training session by attendees | <ol style="list-style-type: none"> Preliminary "investigation phase" => good understanding of the social ecosystem and impact investing needed (access to finances, social impact investing) Identification of FIs to be investigated Preparation of a training agenda - 4 modules with several independent sessions (theoretical & practical sessions with Q&A) |



8.2. TOPICS OF TRAINING SESSIONS IMPLEMENTED

Table 7: Topics that were implemented in all three projects

| | RESTAURA | FORGET HERITAGE | IFISE |
|--|---|--|--|
| Organisational partnership model (main emphasis in the project) | PPP => financial model (revitalisation of cultural heritage sites => step by step) | PPC => management model (contents => a 3-year-long programme of cultural heritage site; only a minor part for infrastructural works) | PPP => financial model (implementation of innovative financial instruments - FIs - for the social economy => how to use them or how to reshape more consolidated modalities with a view of generating a social benefit) |
| TOPICS of Training Sessions | | | |
| Finances | <ul style="list-style-type: none"> Funding of reconstruction - where does the public sector find the private financial resources (for infrastructure, not for day-to-day management) | <ul style="list-style-type: none"> Fundraising & financing of activities | <ul style="list-style-type: none"> Knowledge on social impact investing, e.g. market, instruments, impact, policies Innovative Financial Instruments, e.g. equity, venture & hybrid instruments, bonds, PPP, state aid, etc. |
| Management | <ul style="list-style-type: none"> Introduction of PPP - legal & economic issues (framework) | <ul style="list-style-type: none"> Management & entrepreneurship Planning & programming activities, strategic thinking, foresight Partnership, cooperation, PPP Tourism and product management Carrying diagnoses and evaluations | |
| Cultural Heritage | <ul style="list-style-type: none"> Public aspects of protecting cultural heritage | <ul style="list-style-type: none"> Heritage and monuments management and protection and culture management Carrying diagnoses and evaluations | |
| Revitalization | <ul style="list-style-type: none"> How to use PPP approach in heritage reconstruction? | <ul style="list-style-type: none"> Urban planning, spatial planning, social revitalization Inclusion and social participation | |
| Communication & PR | | <ul style="list-style-type: none"> Communication, marketing, PR, advocacy | |