Project no. 727040

GIFT
Meaningful Personalization of Hybrid Virtual Museum Experiences Through Gifting and Appropriation

Horizon 2020

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Virtual museums and social platform on European digital
heritage, memory, identity and cultural interaction.

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D4.1
Evaluation Strategy and Change Process Report

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Project Consortium

Beneficiary no.	Beneficiary name	Short name
1 (Coordinator)	IT University of Copenhagen	ITU
2	Blast Theory	Blast Theory
3	Next Game	NextGame
4	University of Nottingham	UoN
5	Uppsala University	UU
6	Europeana Foundation	EF

Dissemination Level

PU	Public	X
CO	Confidential, only for members of the consortium (including the Commission Services)	
EU-RES	Classified Information: RESTREINT UE (Commission Decision 2005/444/EC)	
EU-CON	Classified Information: CONFIDENTIEL UE (Commission Decision 2005/444/EC)	
EU-SEC	Classified Information: SECRET UE (Commission Decision 2005/444/EC)	

Type

R	Document, report	X
DEM	Demonstrator, pilot, prototype	
DEC	Websites, patent filling, videos, etc.	
O	Other	
ETHICS	Ethics requirement	

D4.1 Evaluation Strategy and Change Process Report

Introduction

This report describes the evaluation strategy for the evaluation of the GIFT framework, to be carried out through task T4.4 (The GIFT Framework) and reported in deliverables D4.2 (Interim Evaluation Report) and D4.5 (Framework Evaluation Report); as well as the plan for the action research project with the Lead User Panel (the Change Process Report), which will be carried out through task T4.1 and reported in deliverable D4.3 (Evaluation Report on Lead User Change Process).

Deliverable D4.1 is described in the GIFT proposal as: *"A report describing the evaluation strategy, summarising key factors that will be measured against, identifying members of the core evaluation group (beneficiaries) and the Lead User Panel (LUP), and detailing the process to be followed to capture data"* (Grant Agreement, Annex 1 part A, p. 19). The report is divided in two parts. The first concerns the evaluation strategy and will describe the process for arriving at evaluation criteria, identifying the core evaluation group and describing our plans for the evaluation of the GIFT framework. The second part outlines the plans for the action research project with the Lead User Panel.

Evaluation Strategy

The GIFT project includes separate processes for evaluating the prototypes developed in work packages WP2 and WP3, and the framework developed in work packages WP4, WP5 and WP6.

Prototype Evaluation
Work package 2 includes tasks (T2.2 and T2.4) for studying and validating the prototypes developed in the work package, documented in deliverables D2.2 and D2.4. Work package 3 has a similar structure, with study and validation tasks T3.2 and T3.4, documented in deliverables D3.2 and D3.4. These study and validation tasks are described in further detail in the Grant Agreement. In addition, work package 4 includes a task for prototype evaluation (T4.2), described as following: "This task will evaluate the user experiences of the prototypes when tested and implemented in museums. This will primarily consist of heuristic evaluation, as well as usability and user acceptance tests. Other tests, including functional unit tests, component and system integration tests and performance and scalability tests are an integral part of the agile software development process and will be performed in WP2, WP3 and WP6" (Grant Agreement, Annex 1 part A, p. 18). This task will be carried out in collaboration between researchers involved in work packages 2, 3 and 4. Interim results will be documented in deliverable D4.2.

Framework Evaluation
Testing and evaluation of the GIFT framework is led by Europeana and carried out through task T4.4 and documented in deliverables D4.2 and D4.5. The evaluation will consist of expert assessments carried out twice: First, at the midway point of the project (mid-2018), and second, near the end of the project (late 2019). The assessment will be based on criteria developed by Europeana and ITU with input from the rest of the consortium. Europeana and ITU have proposed that the framework should be evaluated against the following main criteria: applicability, clarity, innovation and relevance.

These criteria, along with a more specific operationalisation of each criterion will be discussed in the September 2017 consortium meeting. However, we will remain open to reassessing the evaluation criteria at later stages based on input from the various project component stakeholders.

This is particularly applicable to the action research project in which input from the LUP will give valuable information about the organization's' needs and key challenges.

The expert assessments will be carried out by each member of the core evaluation group (listed below), as well as a group of experts selected by Europeana. Europeana will collect all the assessments and systematize them to identify core insights that should be used to improve the framework, and to inform the application of the framework by the LUP. Results from the midway evaluation will be documented in deliverable D4.2, due 31 August 2018. Results from the 2019 evaluation will be documented in deliverable D4.5, due 31 December 2019.

Core Evaluation Group and Lead User Panel
The core evaluation group consists of one representative from each beneficiary in the GIFT consortium. When possible and feasible, the core group will seek additional input from other participants in the project, such as the Lead User Panel. In order to facilitate the communication in the core evaluation group a shared work environment will be created, in the form of a shared document repository in the project's wiki/collaboration tool (cf. D1.1).

The core evaluation group:
- Nicole McNeilly, Europeana (leader)
- Martin Pichlmair, IT University Copenhagen (WP4 leader)
- Steve Benford, University of Nottingham
- Annika Waern, University of Uppsala
- Matt Adams, Blast Theory
- Bogdan Spanjevic, NextGame

The Lead User Panel:
- Lucia Garcia, Managing Director, LABoral Centro de Arte y Creacion Industrial, Spain
- Daniel Martin, Curator of Making, Derby Silk Mill, United Kingdom
- John Coburn, Digital Programmes Manager, Tyne & Wear Archives & Museums, United Kingdom
- Kevin Bacon, Digital Manager, Royal Pavilion & Museums, Brighton & Hove, United Kingdom
- Georg Andreas Broch, Head of Administration, Center for Studies of Holocaust and Religious Minorities, Norway
- Rick Lawrence, Digital Media Officer, Royal Albert Memorial Museum & Art Gallery, United Kingdom
- Chiara Organtini, program manager, CAOS centro arti opificio siri, Italy
- Erica Gangsei, Head of Interpretive Media, San Francisco Museum of Modern Art, United States of America
- Kristina Andersen, Manager and holder of IP, Michel Waisvisz Archive, The Netherlands

Note: The Danish Architecture Centre, which is named as a member of the LUP in the Grant Agreement, withdrew from the panel on 9 June 2017 due to capacity reasons in connection with their move to a new building.

Change Process

One of the main objectives of the GIFT project is to develop a framework for meaningful personalization of hybrid virtual museum experiences. As described in the Grant Agreement this objective is divided in two parts, of which the second part consists of an Action Research process with a Lead User Panel with representatives from prominent European museums (Annex 1 part B, p. 7). This process, the Action Research Module (ARM), will aim to answer the following research

question: *How can the design knowledge that arises from our research be formalised in a concrete and actionable way so that the curators of heritage experiences across Europe can put them into practice?* The ARM will enable the participating institutions to design playful, meaningful experiences and evaluate their success as well as their impact on the institution. These experiences will explore and affect the themes of gifting and appropriation embodied in other work packages within GIFT. The following section describes how these goals will be reached.

The Action Research Process
The Action Research process implemented in the GIFT project is based on the *Let's Get Real* project by Culture24. *Let's Get Real* workshops focus on the implementation of digital tools, which can include email lists, social media channels, and the development of digital content in order to build the digital capacity of cultural heritage organizations. Culture24's method is derived from Participatory Action Research (PAR). This school of Action Research uses personal experience to observe phenomena and conduct experiments to gain knowledge. PAR is based on reflection, data collection, and action. The participants in the Action Research workshops will identify areas that they are interested in changing in their institutions, develop experiments related to those areas, define how to evaluate those experiments, collect data based on their observations, and reflect upon their outcomes.

The definition of the specific behavioral changes that institutions should achieve will be scoped and detailed in collaboration with the LUP at the commencement of the project. Evaluation methodologies to identify and measure success will also be developed together with the LUP. Partners from Culture24 will work in collaboration with representatives from IT University of Copenhagen (ITU) to replicate these evaluation strategies in the LUP workshops.

During the first LUP workshop, participants will be asked to define the areas for desired growth within their institutions (examples may include engagement with specific demographics, activation of a specific digital platform, enhanced interdepartmental communication, expanded technical resources, refined digital skills), as well as specific objectives and key quality factors. At and between the four subsequent workshops in the Action Research process, LUP representatives will craft and execute at least one experiment oriented towards accomplishing their objectives, and will measure their progress with the criteria they develop during the Action Research process.

ITU will adapt Culture24's pre-existing materials for identifying and tracking these metrics. These materials are approachable, easy-to-share, self-generated documents that contain questions about target audiences, desired interactions, budget, and interdepartmental collaboration. Most importantly, the evaluation of each experiment is evaluated according to KPIs and measurements developed specifically for the respective experiment during the second workshop.

While we expect the experiments executed in the LUP to take many forms, we offer the following examples of what evaluation goals and measurement methods might look like:

- an experiment for a LUP partner website could have the success criterion of boosting site impressions by 10% and is measured using web analytics.
- an experiment in an exhibition space may include a number of positive survey responses as a criterium, measured by a volunteer or staff member located in a gallery.
- a marketing experiment may include the success criterion of increasing visitor attendance by 5% and measuring the number instances a particular traceable coupon code was used.

We will encourage the LUP representatives to develop qualitative as well as quantitative methods for evaluating the success of their experiments. Developing KPIs and working out suitable ways of

measuring success are part of the learning goals for the LUP representatives as well as their institutions. After the LUP have run experiments, we will return to the change-areas identified in the beginning, and use this as a baseline for the best practice framework. This will happen in the last two Action Research workshops.

In the time between workshops, LUP participants will receive 1-2 coaching sessions from ITU staff. These coaching sessions are intended to solve problems, answer questions, and provide support to individuals conducting experiments within their institutions.

The results of the change process in the LUP will be part of D4.3 Evaluation Report on Lead User Change Process and contribute to D4.4 The GIFT Framework.

Changes to the Action Research Process in the Grant Agreement
Following a recommendation from our partner Culture24, in order to secure buy-in and collaboration from key stakeholders within the lead user's organisations, we have made some adjustments to condense the action research process in time as compared to the plans set out in the original proposal. First, we have shortened the process so that it will run over 18 months, while still including all the phases of the process used by Culture24 in their Let's Get Real projects that form the basis for the project. Second, we have also reduced the number of LUP workshops from six to five, with the third workshop representing both the end of phase 1 and start of phase 2. Even with these changes, the ARM process represents an extended version of the Let's Get Real project model, which normally runs over 9 months and consists of 4 workshops.