Project no. 727040

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

Horizon 2020

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Project Consortium

Beneficiary no.	Beneficiary name	Short name
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4	University of Nottingham	UoN
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CO	Confidential, only for members of the consortium (including the Commission Services)	
EU-RES	Classified Information: RESTREINT UE (Commission Decision 2005/444/EC)	
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Type

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

1. Introduction

This deliverable reports the interim results of work package 4 in the GIFT project. As formulated in the Grant Agreement Description of Action (DoA), the aim of the report is to present:

"Interim results of evaluation after conclusion of first iterations of prototypes focusing on museum evaluation and prototype evaluation, with suggestion for improvements and changes for second iterations." (GIFT-proposal, page 57).

The focus of the report will be on evaluation done in relation to the Action Research Module (ARM) with the Lead User Panel (LUP). This includes a presentation of the work done in ARM to date (section 2) and a description of how prototype evaluation, framework evaluation and process evaluation have been conducted so far in ARM (section 3, 4 and 5).

The report covers the period from June 2017 till August 2018.

2. The Action Research Module

2.1. PARTICIPANTS

The participants in ARM (the members of the Lead User Panel) are representatives from the following museums:

1. ARKEN Museum of Modern Art, Denmark
2. CAOS Centro Arti Opificio Siri, Italy
3. Center for Studies of Holocaust and Religious Minorities, Norway
4. Danish Museum of Science & Technology, Denmark
5. Derby Silk Mill, United Kingdom
6. The Munch Museum, Norway
7. Royal Albert Memorial Museum & Art Gallery, United Kingdom
8. Royal Pavilion, United Kingdom
9. San Francisco Museum of Modern Art, United States of America
10. Tyne & Wear Archives & Museums, United Kingdom

The list above corresponds to the updated list of ARM members approved in periodic review 1. It includes three museums displaying art works, four museums displaying historical artefacts and three museums displaying both art works and historical artefacts. This composition makes it possible to gather insights from a variety of institutions operating in two important museum domains (art and history), providing us with good opportunities for collecting learnings with broad relevance for the museum sector at large.

2.2. ACTIVITIES

ARM was initiated in September 2017 and is scoped to end in the first half of 2019. The process is anchored around five workshops of 2 days duration where the ARM participants meet and work, as well as research phases in between the workshops where the participants conduct small-scale "experiments" in their respective organisations (see Figure 1: Action Research Module Process). During the research phases, the participants are offered online mentoring sessions with members of the research team at ITU. During all workshops, the participants also meet and collaborate with researchers and designers from the other work packages. Three workshops have been held during the period covered by this report. Each workshop has taken place at one of the participating museums in United Kingdom, Italy, and Denmark.
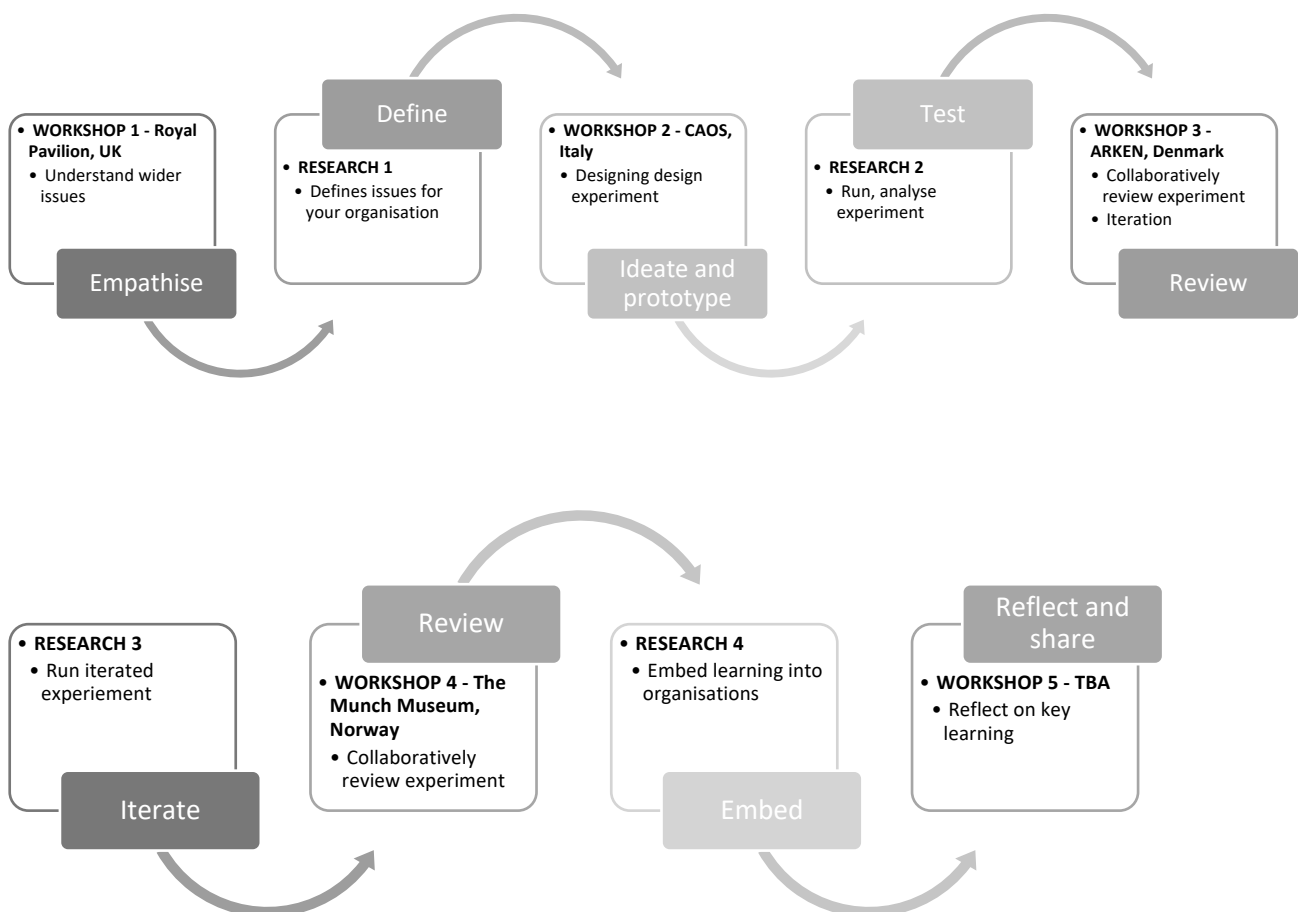

Figure 1: Action Research Module Process

At **Workshop 1** *(*Royal Pavilion, Brighton, UK *25-26 September 2017)*, the GIFT project was introduced and the participants made a range of exercises with the purpose of reflecting upon and discussing their understanding of GIFT-related concepts and how to define change objectives for

their organisations within this context. After the workshop, the participants set up working groups in their organisations in order to embed GIFT activities and learning. Discussions in the working groups were shared with action researchers from the IT University of Copenhagen (ITU) and the working groups were prompted to advance further in narrowing down the change objective and thus the focus of their upcoming experiments.

At **Workshop 2** *(CAOS, Terni, Italy 5-6 February 2018)*, experiments were collaboratively developed for each participant. After the workshop, the experiments were further developed and then initiated by the participants and their working groups, assisted and mentored by the action researchers and other researchers from GIFT (mostly from WP4 and WP6).

At **Workshop 3** *(ARKEN Museum of Modern Art, Copenhagen, Denmark 30-31 May 2018)*, the experiments were reviewed and iterated for a second run. Through presentations and discussions, the participants collaboratively developed strategies for evaluating and iterating their experiments. In order to support the experiment iterations, we included in the program a keynote talk on play and playfulness by Miguel Sicart, one of the ITU researchers, as well as a hands-on lo-fi prototyping session.

Workshop 4 and 5 are planned to take place 26-27 November at the Munch Museum in Oslo and March/April 2019 (exact date and location to be decided). At these workshops, the focus will be on evaluating the experiments in order to reflect on learning (for individuals, organisations and the sector) and implement learning from the process in the participants' organisations.

In **the research phases** between the workshops, online mentoring sessions with the museum participants and the ARM-researchers from ITU have been conducted to support the individual participants' processes. In **Research phase 1**, ten individual online sessions were carried out focusing on developing change objectives. In **Research phase 2**, the participants were paired to create synergy and five sessions focusing on the experiments were carried out. The pairings were very successful and four partners decided to continue the ongoing knowledge and practice exchange and visited each other on their own initiative.

The ARM participants also engage in continuous discussions in our **online project forum**, a closed and password protected forum at Basecamp.com dedicated to the ARM process. In this space the ARM participants, the action researchers at ITU and other GIFT consortium partners continuously discuss and exchange experiences, reflections, questions, information, etc.

3. Prototype evaluation in ARM

Prototypes from the other work packages have been presented and evaluated in ARM at several occasions in the process.

As set out in the DoA (Milestone 3), the prototypes from both WP2 and WP3 were both presented at the first ARM workshop, followed by an evaluation session in which the ARM participants were invited to comment and give feedback on the prototypes. This allowed the teams in WP2 and WP3

to collect valuable inputs from the ARM participants at an early stage in their design processes. The further design work that was informed by these sessions is reported in deliverables of WP2 (deliverables 2.1, 2.2, 2.3 and 2.4) and WP3 (deliverables 3.1 and 3.2).

At workshop 2, prototype tools from WP6 were presented to the ARM participants. A prototype version of a set of museum specific ideation cards, developed by researchers from the University of Nottingham, was tested and used as a means for designing experiments.

At workshop 3 the ARM participants tested a prototype version of a design method using micro-LARP scenarios. This prototype has been developed in WP5 by GIFT consortium members from the University of Uppsala, along with ITU and UoN, and is intended to help designers and museum professionals understand and empathize with the challenges encountered by different stakeholders in design processes when creating hybrid museum experiences.

The remaining two workshops will include similar prototype evaluation and tests in order to ensure that the design processes in the project are informed by the real needs of museum partners, and to facilitate shared learning and knowledge exchange between the museum participants and consortium partners.

4. Framework evaluation in ARM

The ARM process has informed and contributed to the design of the GIFT Framework (D4.4) in numerous ways. First, initial data and input from ARM was used as basis for a workshop with researchers from ITU and UoN 17-19 January 2018, outlining the end user needs that the framework needed to meet. The ITU researchers leading ARM prepared a document summarising input from the ARM participants so far (see Appendix 5), which was presented in the workshop and used as basis for an ideation session to identify museum needs and which parts of the GIFT project would provide the necessary tools, guidelines and documentation to meet those needs. The outcome of this session was an outline of the structure of the framework website, along with a structured list of questions that the website should provide answers to, for each element of the framework.

Second, these documents were used as basis to develop a template for framework webpages. In collaboration between the ITU and UoN team two sample pages were produced and presented to the participants in ARM workshop 3, in order to test whether the information was useful and appropriate for the museums' needs. The feedback was audio recorded and analysed by ITU researchers, and summarized in a document (Appendix 6) that was used as basis for revising the templates, and creating a prototype website. This website was developed through an iterative process involving both the ITU and UoN teams throughout the fall semester of 2018. A "beta" version of this website went online at gifting.digital shortly before ARM workshop 4, with a view to start an ongoing dialog with ARM participants and the Framework Partners aimed at further revising and developing the website in the final year of the project.

5. Process evaluation in ARM

5.1. THE ROLE AND CHARACTER OF PROCESS EVALUATION

Evaluation is an essential activity in ARM since the process is constructed in line with Action Research and Participatory Action Research. These approaches entail a desire to not impose change *on* others but to change *with* others (Reason & Bradbury 2008; McTaggart 1991) or – as stressed by Freire (1971, p.62) – to have faith in people and "believe in the possibility that they can create and change things". An action research process therefore resists linear planning but thrives as a living dialectical process that emerges from the interaction between researchers, participants and the contexts of action (McTaggart, 1997; McIntyre 2008). For the purpose of securing this emergence, on-going evaluation is crucial. Even though the action researchers have plans and ideas for ARM, these plans and ideas are constantly developed and iterated upon through evaluating inputs from and interactions between the ARM participants at the workshops, after the workshops and in the online mentoring sessions and other interactions. Furthermore, the experimental approach taken in ARM is inspired by Theory of Change, which prompts the participants to do evaluation continuously throughout the process (e.g., Connell & Kubisch 1998; Weiss 1995).

Thus all implicated actors, both action researchers and ARM participants, take actively and continuously part in evaluation throughout ARM. For the sake of dissemination, it is helpful to distinguish between three phases of process evaluation:

1) Pre-experimental evaluation: Evaluation done before ARM participants constructed and carried out their experiments.
2) Experimental evaluation: Evaluation done while experiments are being carried out.
3) Post-experimental evaluation: Evaluation done after the experiments have been carried out.

5.2. PRE-EXPERIMENTAL EVALUATION

The pre-experimental phase was planned to not only introduce the ARM participants to the GIFT project. More so, the purpose was to get to know how they understood and had previously worked with relevant theoretical concepts and how the ARM participants could define change objectives for their organisations within this context. Before the first workshop, the action researchers compared Expressions of Interests (written by the participants before they were accepted as participants in the process) with the GIFT proposal. This analysis highlighted GIFT related concepts that seemed to be of particular relevance for the participants. Four concepts were chosen by the action researchers:
- 'Personalisation'
- 'Playfulness'
- 'Visitor engagement'
- 'Digital'

At **Workshop 1**, The participants were asked to evaluate their own and their organisations' relation to these concepts by using two process tools that were further inspired by theoretical perspectives from organisational museum studies, such as Parry (2013), Parry & Sawyer (2005) and Peacock (2008). One of the tools focused on the three first concepts ('personalisation', 'playfulness' and 'visitor engagement') (Appendix 1: Concept Map), the other on the fourth concept ('digital') (Appendix 2: Digital Capacity Gauge). This separation was chosen in order to encompass both analogue and digital perspectives.

In **Research phase 1**, the participants used the process tools (Appendix 1-2) with their internal working groups and shared outcomes with the action researchers via an online form. Combining evaluation of the forms and perspectives from Theory of Change, mentoring sessions with each participant was structured around three aspects: 'Change objectives', 'target audience' and 'assets'. The participants were prompted to reflect more on these concepts, both individually and collectively in their working groups before the second workshop. The ARM participants asked for help to structure their discussions and a set of questions for facilitating the internal discussions were developed and used in the working groups (Appendix 3: Change Questions). The inputs from participants on change objectives, target audience and assets were evaluated and summed up in a document (Appendix 5: Museum Evaluation), which was shared with other GIFT work packages in order to feed into the development of the framework (WP4), the toolkit (WP6), the prototypes (WP2 and WP3) and the theory (WP5).

Combining evaluation of inputs from participants and perspectives from Theory of Change, a process tool was introduced that was used by participants at **Workshop 2** to plan their experiments (Appendix 4: Experiment Planning Card).

5.3. EXPERIMENTAL EVALUATION

At **Workshop 3,** the participants reflected upon and evaluated their experiments and–through this evaluation–decided on iterations for the second run of the experiments. Key learnings at this point focused on the value of testing and difficulties with getting the rest of the museum organisation to prioritise the work and the experiments. The museum participants expressed how tools such as the Experiment Planning Card (Appendix 4) and the Ideation Cards (WP6) had helped them to communicate and integrate the knowledge from ARM into the organisations. Others used downscaling strategies (made the experiment smaller) or upscaling strategies (enlarged the experiment and wrote it into the overall museum strategy) in order to be able to plan and execute the experiments.

In **research phase 3**, the participants and their working groups finalise the experiment iterations and run the iterated experiment.

5.4. PLANS FOR THE POST-EXPERIMENTAL EVALUATION AND OUTPUTS

The post-experimental evaluation will take place at workshop 4 and 5. The ARM participants will evaluate and reflect on their learning from designing and running the experiments in order to

iterate on the introduced approaches (e.g., the process tools in appendix 1-4), embed key learning in their organisations and develop best practice recommendations for the museum sector. The outputs (iterated process tools, knowledge and recommendations) will be reported in 'D4.3 Evaluation Report on Lead User Change Process', and will also feed into 'D4.4 The GIFT Framework'. Furthermore, the outputs will be analysed and disseminated through scholarly publications, the GIFT book (D5.3) as well as the other dissemination activities in the project. In particular, ITU researchers have initiated a collective writing process together with the ARM participants, in which we hope to write a co-authored journal publication where the ARM participants are not only subjects, but also co-authors of the research.

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Appendix 1: Concept Map

HOW GIFT'ED IS YOUR MUSEUM?

	A	B	C	D
	AWARENESS (e.g. your own, in team, in department, cross-department? How do you think/talk about it)	PROJECTS / SOLUTIONS (e.g., developed/implemented by one, a small team, entire department, across departments? Describe examples)	RESOURCES (e.g., yourself, in team, in department, cross-department? Related to concrete projects or free agents? From funding?)	PLANS (e.g., your own, in team, in department, cross-department? What are your concrete plans? Future ambitions?)
1 PERSONALIZATION (e.g., through narratives, appropriation, social networking)				
2 PLAYFULNESS (e.g., through games, interactives, challenges)				
3 VISITOR ENGAGEMENT (e.g., through dialogue, co-creation, flexibility)				

Appendix 2: Digital Capacity Gauge

GIFT Project
Digital Capacity Gauge

CAPACITY ATTRIBUTE	Description of a digitally capable organisation (i.e.Level 4)	DIGITAL CAPACITY LEVEL (low to high)				NOTES	PRACTICAL ACTIONS TO DEVELOP CAPACITY
		1	2	3	4		
Purpose	.The organisation has a clear purpose/mission in place · The organisation's purpose/mission is regularly reviewed and updated. . The organisation's purpose incorporates/connects and values digital practice · Digital practice is owned and championed at a senior level and supported by appropriate budgets. · Digital practice is embedded across all teams/departments of the organisation.						
Understanding	The organisation understands: . Its environment and the impact of digital technologies and digital culture on it. . Its audiences particularly their digital behaviours, motivations and contexts.						
Principles	The organisation: . Always designs its outputs, services and products in response to audience needs · Involves audiences in the co-creation of its output, services and products · Is a hub for a thriving community of active users, contributors, participants and developers. . Values participatory practice and collaborative/personalised interaction						
Leadership	The organisation has leadership that is: · Bold · Open · Curious · Collaborative						
People	The organisation has people who are: · Digitally confident and digitally literate. . Empowered · Able to work experimentally, take risks and learn from successes and failures · Audience focused and able to design for audience needs. · Able to work collaboratively . Able to use data to inform and evaluate their work						
Content	The organisation has digital content that is: . Available, open and useful for its audiences. . Editorially relevant for its audiences . Technically relevant for its audiences . Presentationally relevant for its audiences						
Systems	The organisation: . Uses technologies that are interoperable, scalable and flexible . Has processes that are fast, integrated and light. .Has access to data that is flexible, comprehensive and available						

Appendix 3: Change Questions

OVERALL QUESTION	SPECIFIC QUESTIONS	RESPONSES
1. CHANGE OBJECTIVE		
What overall change(s) do you want to result from your experiments?		
	What is the change?	
	Why is this change important for your organisation?	
	Why is this change important for your team and/or department?	
	Why is this change important for you personally?	
	What do you think the most important outcomes of this change will be?	

2. TARGET AUDIENCE		
How do you understand the specific target audience you're making these changes for?		
	Who is the target audience?	
	What typically motivates this target audience to engage with museums and collections (and yours in particular)?	
	What typically motivates this target audience to engage with other forms of creative and cultural content?	
	What typically motivates this target audience to engage with digital content?	
	What kinds of typical behaviours can you observe of this target audience's engagement with museums and collections (and yours in particular)?	
	What kinds of typical behaviours can you observe of this target audience's engagement with other forms of creative and cultural content?	

	What are the typical behaviours of this target audience when they engage with digital content?	
	Where is the target audience located when they engage with museums and collections (and yours in particular)?) Who are they with, and how might they be feeling?	
	Where is the target audience located when they engage with other forms of creative and cultural content? Who are they with, and how might they be feeling?	
	Where is this target audience when they engage with digital content? Who are they with, and how might they be feeling?	

3. RELEVANT ASSETS

What relevant assets do you have to enable the change(s)?		
	What relevant networks or partnerships does your museum have?	
	What relevant exhibitions, events and projects has your museum been involved with?	

	What relevant spaces could your museum use?	
	What relevant stories can your museum tell?	
	What relevant collections objects or other content does your museum have?	
	What relevant expertise and skills do you or your colleagues have?	
	What relevant existing channels does your museum have or use?	

Appendix 4: Experiment Planning Card

Experiment Planning Card

Name:
Organisation:

Culture24/

OBJECTIVES

•What overall change to you want to enable?

AUDIENCE

•Who is the target audience?

OUTCOMES

•What are the measurable outcomes ?

ASSETS

•What relavant assets do you have?

Experiment Planning Card

Name:
Organisation:

Culture24 /

QUESTION Our experiment will test....	
ACTION To test this we will....	
WHO & WHEN This will be done by.....	
MEASURE We will capture data related to....	
CHALLENGES We envisage these challenges....	
NEXT STEPS Our practical next steps are.....	

Appendix 5: Evaluation of inputs from museum participants, January 2018

Evaluation of inputs from museum participants
The action research process of GIFT

Situational Information:

Generally speaking, participating museums usually exist in one of two sizes:
- **Larger museums** with one or few digital flag-carriers, staff must move slowly to push new programs through bureaucratic systems. Usually other departments or staff are vying for the same resources or opportunities.
  or
- **Small, lean organizations** with more limited resources and higher digital capacity amongst staff. Staff find themselves simultaneously serving in multiple roles, but can act more quickly and are less beholden to bureaucratic procedures.

All organizations feel varying degrees of pressure regarding funding and permission to implement new initiatives. Participants have told us that measurable output and clear evaluation metrics are useful in retaining both funding and internal support. Other helpful qualities include external prestige from press coverage, grants (like GIFT), and the participation/model of other high-profile museums.

Generally, digital initiatives in our partner museums are pushed by one person or a small group of project-leaders who must evangelize digital programs to other parts of the museum.

Technical capacities within organizations range from having very developed APIs to struggling for Wi-Fi coverage throughout their buildings. Multiple participants have remarked on the role Wi-Fi access serves for both staff and public.

Objectives:

The following themes were identified by participants as objectives for their participation in GIFT, and the experiments they will develop in the process. They have been grouped by theme.

Better understanding and working with audiences (closing the loop)
- Developing and maintaining consistent relationships with the museum's local communities
- Opening up spaces—both physical and figurative spaces
- "Leaving the space" for audiences to respond
- Exploring audience behavior and understanding how to use that understanding to better engage audiences

Connecting audiences and content in meaningful ways
- "How do we get our digital content out there?"

- Finding ways to translate digital content into meaningful visitor experiences, particularly through personalization and playfulness
- Finding ways to translate research into useful, meaningful, and/or playful interactives
- Connecting digital content with exhibition content
- Refining pre-existing programs through games and technology

Building internal capacity
- Expanding digital capacity internally among staff
- Raising awareness of audience demographics/perspectives/experiences amongst interdepartmental staff-members
- Obtaining a toolkit to share with colleagues (e.g., a checklist with questions about resources, audience, external partners, evaluation etc.)

Target audiences:

The following themes were identified by participants as potential target audiences for experiments they will develop in the process. They have been grouped by theme.

Outsiders
- People who feel alienated by high culture
- Newcomers/immigrants

Creative Cohort
- The local artistic community
- Other museums looking to accomplish similar goals

Young Audiences
- Teens
- College students that pass by the museum
- Students and school groups

Other
- 24-40 year-old industry-specific workers
- Families
- Older communities
- All people with smart phones

Relevant comment from participant: Audiences need to be "met where they are," physically, intellectually and culturally. This could look like, and has looked like, interventions outside the museum, featuring alternative voices (in text and in real life) that aren't regular-institutional-museum-voice, and lightweight, "sideways approaches" that bring the museum out into the community.

Assets:

The following were identified by participants as potential assets to use while developing experiments in the process. They have been grouped by theme.

Staff
- Staff's enthusiasm and digital competencies
- Staff's extensive subject knowledge

Existing Infrastructure
- The museum already has good digital resources available
- The museum already has existing digital content
- The museum already has good existing learning initiatives

Community Relations
- The people and companies who live in the surrounding area
- The local municipality is enthusiastic about the museum
- The museum has good partnerships with other museums
- The museum has done good co-production with other community stakeholders

Research Support
- The museum participates in other grant programs or research partnerships that provide support or tools

Appendix 6: Feedback on Framework prototype at ARM workshop 3, May 2018

Feedback from the ARM Workshop — How could the GIFT framework be more effectively presented and marketed?

On Wednesday 30th May, a workshop was held were members of the GIFT and ARM teams presented the current draft format of the framework to museum professionals. Notes were taken of the discussion and presented as a 'Q&A' format as follows:

Q: What value does this provide for us?

Museum staff would look at the tool from a didactic point of view -- the framework should not only demonstrate what it is or what it does, but it should also demonstrate the value that it provides to the organisation, to the visitors and to the institute as a whole. This should be emphasised in the way that we present the framework.

Q: What would the experience look like? What are the steps?

A suggestion would be to visually represent user journeys, either through a series of screenshots or a video.

Q: How does this offer an advantage or a solution over existing social media platforms? What is it that the tool(s) framework can provide for museums and visitors that cannot already be provided by smartphones, existing platforms?

The tools / framework need to demonstrate competitive advantage: how are they more useful / easier to use than existing tools / platforms.

Q: Are (the presentation of) case studies the most effective means of marketing the GIFT tool / framework?

We present case studies and testimonials from museum staff as a means of marketing the framework. Are there also other ways to demonstrate value?

Q: Why is this really important?

What core human needs to the tools (and their implementation) solve. If we were to use Janet Murray's (2012) framework of identifying 'core human needs', we could break this question down into the following sub-questions.
  - *Functional*: How will these tools benefit or improve the work-practices of museum staff. What can visitors do with this tool?
  - *Context*: How can these tools be used to improve the relationship between the institution / visitors, the visitor experience, or the social relationship between museum visitors?
  - *Core*: What deep, enduring human activities do the tools / framework support? Gifting? Co-creation? Strengthening of the social bond between museum-goers / visitors?

Q: How do the tools fit into the bigger context / picture of the GIFT project, and of museum practices in general?

This could be partially solved by improving or re-considering the site architecture / navigation (which we understand is still a work in progress).

Q: There is a concern that the presentation of the product / framework is very 'tool-centric'. How do you plan on addressing this?

Are there other ways of presenting the framework that focus more on adding value to the organisation / work-practices ("why should we use this?") or addressing core human needs (see the above answer to 'why is this really important?').

Q: How can we effectively 'sell' the product / framework to museum if it doesn't solve clearly-defined organisation problems?

One solution that was raised within the ARM meeting was to "invent" a list of problems, e.g.:
  - "Are you looking at ways of creating interpersonal experiences?"
  - "Would you like your visitors to talk more about the artwork / create dialogue / share / foster interactions etc."

Q: Have you considered a marketing or communications plan for this tool? For example, how could museum staff (front of house staff for example) talk about the tool and bring it to visitors?

For example, the tool could also provide notes / talking points / bullet points that front-of-house museum staff could use.

Q: "So many people want to sell an app to us" / "It's the same thing that a smartphone could do?"

What makes your tool / framework special?

Q: "The framework is just a website with some quotes, a user manual, and pretty pictures of people looking at smartphones".

The tool should be presented in terms of relationships, not "gadgets" or "individual / personalised" contexts (takes people away from one another). Museums by their very nature are highly social experiences -- GIFTING is a result of a social / relationship-oriented experience.

Q: Can the tool be embedded / demonstrated as part of a larger process?

How does this fit into existing work-practices / vision / strategy of museums?