

## LEARN-IP - Intellectual Property Rights and Geographical Indication Training for Cultural Heritage and Cultural Tourism



## LEARN-IP Guidelines A Handbook for Trainers

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Co-funded by the  
Erasmus+ Programme  
of the European Union

The European Commission support for the production of this publication does not constitute an endorsement of the contents which reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein. Project number: 2018-1-DE02-KA202-005232

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## 1.0 Introduction – about the LEARN-IP guidelines for trainers

The **LEARN-IP** training on intellectual property rights (IPRs) for cultural heritage management and cultural tourism consists of two instruments:

1. A digital training platform that trainers, as well as learners, can use for working in a pre-developed course. Trainers might also create their own content: <https://moodle.learn-ip.eu> (please see Chapter 2).
2. This Trainers' Kit which offers additional tools and instruments for trainers only (a summary is presented in Chapter 3).

These guidelines were developed as a multilingual “Kit for Trainers” that is available in six European languages: English, German, Spanish, Romanian, Bulgarian, and Macedonian. It is intended to be a practical manual of instructions and instruments for the uptake of the **LEARN-IP** learning units in the vocational training market. It is a support tool for trainers who are interested to include training on intellectual property rights into their portfolio and provides a multitude of drafted templates, worksheets, and links for different training purposes. It also includes examples – better and worse – for illustrating the sometimes complex training contents on intellectual property rights beyond those good practices which are included in the training modules.

Chapter 4 is dedicated to overarching topics which comply with all modules. In Chapter 5 the seven training modules are presented first in summaries in order to get an overview of the content. Then tools for the single modules are presented in order to provide trainers with easy-to-access training tools as essentials for the whole learning process. Trainers will have a big advantage as they do not have to draft these essentials by themselves but can use them in easy-to-use templates enriching their training.

### 1.1 Whom does this Kit target?

The **LEARN-IP** training targets cultural heritage managers and cultural tourism actors. They are experts in their field from their education and they usually turn to training institutions when they have a specific training need that cannot be met in their own institution. Training providers can be public or private organisations, and it is to their staff that this Kit is addressed. So if you offer training in general, these Guidelines might be of interest to you. Possible providers are for example:

- The training institutions of the local, regional or national monument conservation bodies,
- The training academies of the Churches (e.g. the Protestant and Catholic Academies) which are operating numerous religious heritage sites,
- Private training providers delivering training for public heritage or tourism institutions,
- Local and regional Destination Marketing Organisations for tourism, which mostly have their own training units,
- Private companies which support tourism agencies in training,
- Institutes linked to academia active in heritage preservation and tourism.

Specifically, this Kit gives providers of vocational training in the heritage and tourism field the opportunity to create and establish a new business field in a growing sector with many unlocked learning and teaching opportunities.

This Kit is created as a package that you can download for free from the LEARN-IP website: <https://learn-ip.eu/kit-for-trainers/>.

## 2.0 The LEARN-IP digital training platform

As a training provider, you have two options for using the LEARN-IP training:

1. You can download the materials from the LEARN-IP homepage <https://learn-ip.eu/information/training-modules/> and edit them according to your clients' requirements adapting them herewith flexibly and individually to your teaching needs. The materials are available in 6 languages: English, German, Romanian, Spanish, Macedonian and Bulgarian. Please note the copyright requirements!
2. You have the option of using the LEARN-IP online campus to offer complete courses in which you can actively involve your learners.

### 2.1 Introduction to the Learn-IP Online Campus

The digital learning platform “Learn-IP Online Campus” (<https://moodle.learn-ip.eu>), is a Learning Management System (LMS) created by the LEARN-IP Bulgarian partner INI-Novation Bulgaria, is based on Moodle<sup>1</sup> and provides authentic learning opportunities. The platform is a fully developed training environment which assures learners with free and open access to all training activities. The “Learn-IP Online Campus” offers aesthetic design and effective user experiences (UX) in the most user-friendly way, easy to use by trainers and learners. During the learning process, the platform allows for extensive interactivity.

The platform provides all training units as educational and training resources of the project in an online version. This LMS enables users to easily customize their account settings and adjust their preferences. There are opportunities to upload various interactive learning materials such as videos and exercises that can illustrate good practices, case studies and other important learning information. Sessions can be recorded upon the learners' consent and posted in a specially designated space. The session could be recorded by the trainer and it will be automatically posted into the respective module block.

---

<sup>1</sup> The word Moodle was originally an acronym for Modular Object-Oriented Dynamic Learning

Here as well, users can choose their preferred language, for example German, Bulgarian, Spanish, Macedonian, Romanian or English. This setting also applies to the appearance of the menu and navigation.

The platform supports two learning scenarios:

- The *self-learning scenario* where users are able to learn without a trainer;
- The *blended scenario* where the online platform supports face-to-face learning. The platform features a responsive design which makes it perfect for supporting face-to-face training.

The online platform is organized in two sections:

- Section 1 is covering the learning units as modules and quizzes from the Learn-IP Training Platform. The learning units are organized in the so-called “course shells”. The Course shell is the box that appears on the main page of the platform alongside with its languages.
- Section 2 is providing the Handbook for Trainers “LEARN-IP Guidelines”.

## 2.2. Learning Activities Tools

All of the digital tools (*Image 1*) and apps that were installed support the implementation of *User-Centered Design (UCD)* and the teleconferencing functionality.

### Lesson

Through the installed learning activity "Lesson", different types of lessons can be conducted:

- For self-directed learning of a new topic
- For scenarios or simulations/decision-making exercises
- For differentiated revision, with different sets of revision questions depending upon answers given to initial questions.

The lesson activity module enables a trainer to deliver content and/or practice activities in interesting and flexible ways. A trainer can use the lesson to create a linear set of content pages or instructional activities that offer a variety of paths or options for the learner. In either case, trainers can choose to increase engagement and ensure understanding by including a variety of questions, such as multiple choice, matching and short answers. Depending on the learner's choice of answer and how the trainer develops the lesson, learners may progress to the next page, be taken back to a previous page or redirected down a different path entirely.

A lesson may be graded, with the grade recorded in the gradebook.

## Quiz

The quiz activity enables a trainer to create quizzes comprising questions of various types, including multiple-choice, matching, short-answer, and numerical. Quizzes may be used:

- As course exams,
- As mini-tests for reading assignments or at the end of a topic,
- As exam practice using questions from past exams,
- To deliver immediate feedback about performance,
- For self-assessment.

The trainer may allow the quiz to be attempted multiple times, with the questions being shuffled or randomly selected from the question bank. A time limit may be set. Each attempt is automatically marked, except for the essay questions, and the grade is recorded in the gradebook. The trainer can choose when and if hints, feedback and correct answers are shown to learners.

Quizzes are implemented to every module for final knowledge check on the theoretical material.

## Assignment

The assignment activity enables a trainer to communicate tasks, collect work and provide grades and feedback. The learners can be requested to submit their tasks / projects within the tool called “Assignment” (screenshot below). Learners can submit any digital content (files), such as word-processed documents, spreadsheets, images, or audio and video clips.

Alternatively, or in addition, the assignment may require learners to type text directly into the text editor. An assignment can also be used to remind learners of 'real-world' assignments they need to complete offline, such as art work, and thus not require any digital content. Learners can submit work individually or as a member of a group.

When reviewing assignments, trainers can leave feedback comments and upload files, such as marked-up learner submissions, documents with comments or spoken audio feedback. Assignments can be graded using a numerical or custom scale or an advanced grading method such as a rubric. Final grades are recorded in the gradebook.

## Survey

A digital app called “Survey” was installed to support the learners’ evaluation capability. The survey activity module provides a number of verified survey

instruments that have been found useful in assessing and stimulating learning in online environments. A trainer can use these to gather data from their learners that will help them learn about their class and reflect on their own teaching.

### *Workshop*

The workshop activity enables the collection, review and peer assessment of learners' work. Learners can submit any digital content (files), such as word-processed documents or spreadsheets and can also type text directly into a field using the text editor. Submissions are assessed using a multi-criteria assessment form determined by the trainer. The peer assessment process and understanding of the assessment form can be practised in advance with sample submissions provided by the trainer along with a reference assessment. Learners may be given the opportunity to assess one or more of their peers' submissions. Submissions and reviewers may be anonymous if required.

### *Interactive communication via Chat and Messages*

The platform allows interactive communication between participants in the training process as trainers or trainees depending on the training scenario. "Chat" and "Messages" options were installed and set up.

The **chat activity** enables participants to have text-based, real-time synchronous discussions. The chat may be a one-time activity or it may be repeated at the same time each day or each week. Chat sessions are saved and can be made available for everyone to view or restricted to users with the capability to view chat session logs.

Chats are especially useful when the group is not able to meet face-to-face, such as:

- Regular meetings of learners participating in online courses to enable them to share experiences with others in the same course but in a different location,
- Learner who are temporarily unable to attend in person talk with their trainers to catch up on work,
- Learners out on work experience getting together to discuss their experiences with each other and their trainer,
- Question-and-answer session with an invited speaker in a different location,
- Sessions to help learners prepare for tests where the trainer or other learners ask sample questions.

Trainers, learners and other users may send and receive **private messages** via Moodle. A trainer can send an individual message to course participants in an easy and practical way.

### *Blog or Forum*

Once the trainer logs into the platform, s/he can easily set up a forum or a blog. This allows for the creation of **Blogs** within a module (which are separate to the core Moodle blog system). You can have module-wide blogs (everyone in the module posts to the same blog), group blogs, or individual blogs. The blog activity can be renamed to reflect its purpose e.g., Learning Log (*Image 4*).

The installed **Forum** tool as a learning activity module allows participants to have asynchronous discussions, i.e. discussions that take place over an extended period of time. There are several types of forums to choose from, such as a standard forum where anyone can start a new discussion at any time; a forum where each learner can post exactly one discussion; or a question-and-answer forum where learners must first post before they can see other learners' posts. The trainer can allow file attachments to forum posts. Attached images are displayed in the forum post.

Learners can subscribe to a forum to receive notifications of new forum posts. The trainer can set the subscription mode to optional, forced, or automatic, or prevent subscription altogether. If necessary, learners can be blocked from posting more than a certain number of posts in a given period of time; this can prevent individuals from dominating discussions.

Forum posts can be rated by trainers or learners (peer evaluation). Ratings can be aggregated to form a final grade which is recorded in the grade book.

Forums have many use cases such as

- A social space for to get learners know each other
- For course announcements (using a news forum with forced subscription)
- For discussing course content or reading materials
- For continuing online an issue raised previously in a face-to-face session
- For trainer-only discussions (using a hidden forum)
- A help centre where trainers, tutors and learners can give advice
- A one-on-one support area for private learner-trainer communications (using a forum with separate groups and with one learner per group)

### **Database**

The database allows contextualization of training to meet the needs of target groups of learners such as staff in small and micro enterprises, public organizations, individuals in their familiar environment. Using database activities has many applications, such as:

- Collaborative collection of web links, books, book reviews, journal references, and more.

- To display pictures, websites, strategies or other materials created by learners for peer comment and review.

The database activity module allows participants to create, maintain, and search a collection of records (i.e., records). The structure of the records is defined by the trainer as several fields. Field types include checkbox, radio buttons, dropdown menu, text area, URL, picture, and uploaded file.

### *Glossary*

The glossary activity module allows learners to create and maintain a list of definitions, such as a glossary, or to collect and organize resources or information.

The trainer can allow file attachments to dictionary entries. Attached images are displayed in the entry. Entries can be searched or browsed alphabetically or by category, date or author. Entries can be approved by default or require trainers' approval before being visible to everyone. If the vocabulary auto link filter is enabled, entries will be automatically linked where concept words and/or phrases appear within the course.

The trainer can allow comments on entries. Entries can also be rated by trainers or learners (peer assessment). Ratings can be aggregated to form a final grade which is recorded in the grade book.

Glossaries have many uses, such as

- A collaborative bank of key terms
- A 'getting to know you' space where new learners add their name and personal detail
- A 'handy tips' resource of best practice in a practical subject
- A sharing area of useful videos, images or sound files
- A revision resource of facts to remember.

### *Folder*

The folder module enables a trainer to display a number of related files inside a single folder, reducing scrolling on the course page. A zipped folder may be uploaded and unzipped for display, or an empty folder may be created and files uploaded into it.

A folder may be used

- For a series of files on one topic, for example a set of past examination papers in pdf format or a collection of image files for use in learners' projects.

- To provide a shared uploading space for trainers on the course page (keeping the folder hidden so that only trainers can see it)

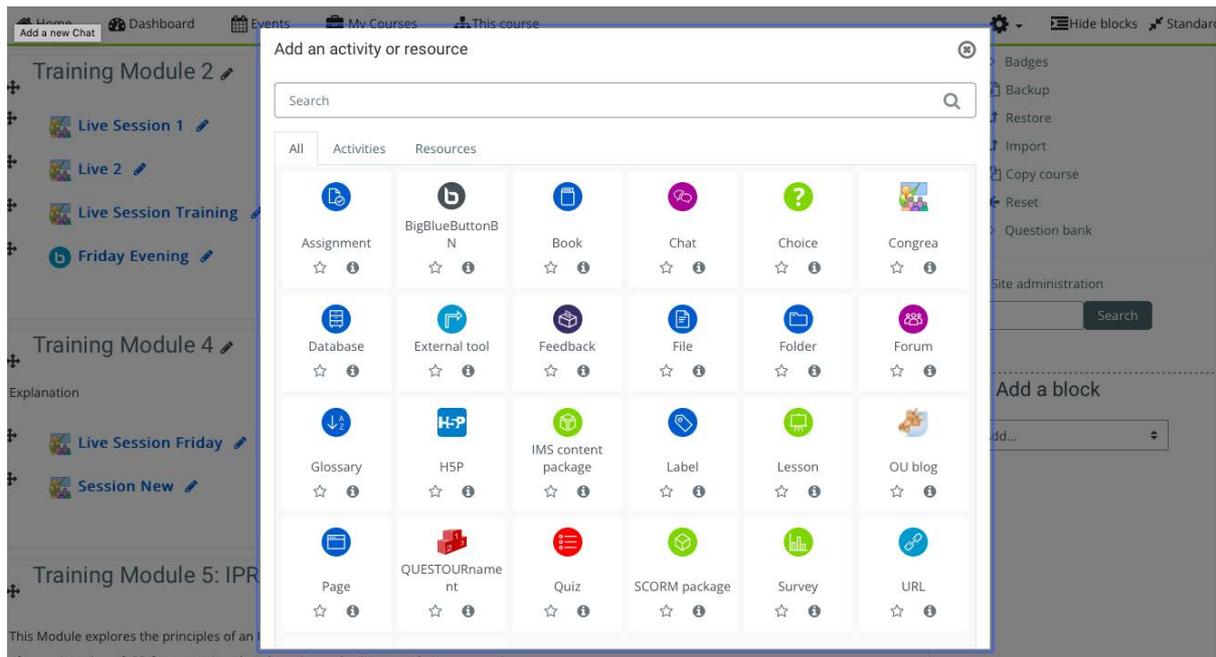


Image 1: Screenshot. Learn-IP Online Platform. All learning activities and tools that were installed by INI-Novation Bulgaria

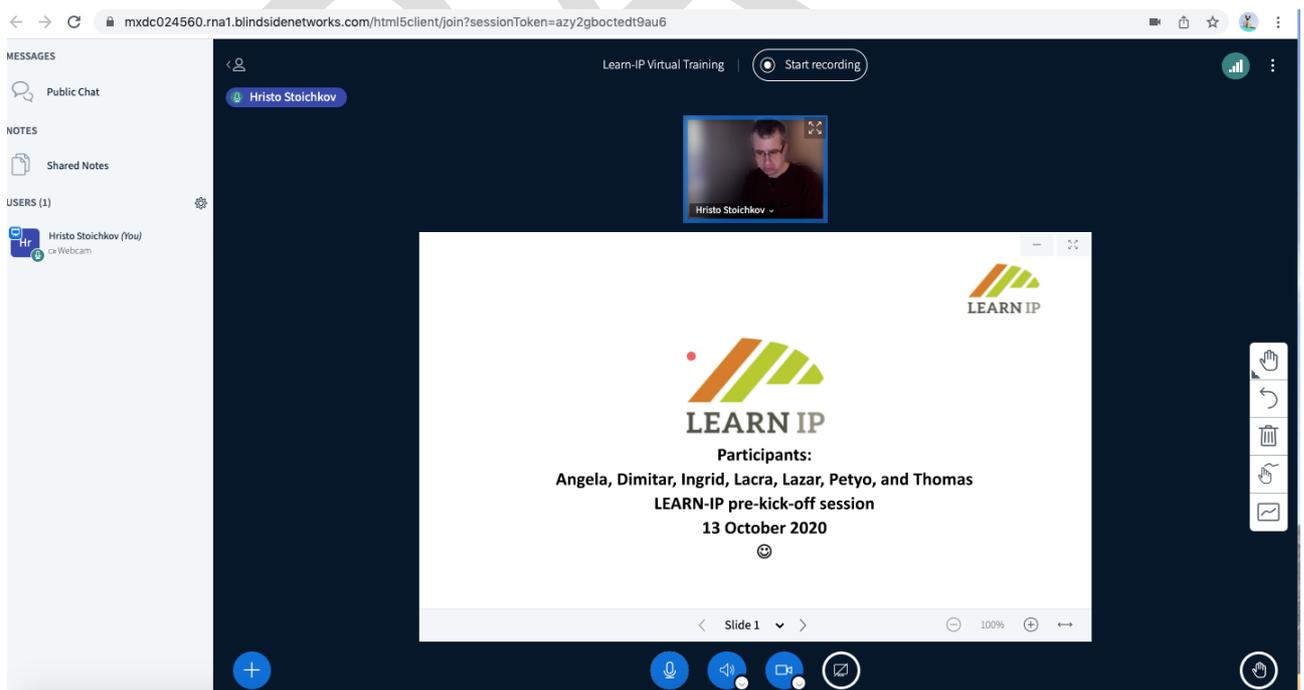


Image 2: Screenshot. Learn-IP Online Platform. Recording a session. The BigBlueButton as an effective synchronous communication learning tool was installed by INI-Novation Bulgaria

## LEARN IP

Home Dashboard Events My Courses This course

Hide blocks Standard view

My courses > Learn-IP Training Modules > Training Module 2 > Friday Evening

This Moodle server is making use of the BigBlueButton testing server that comes pre-configured by default. It should be replaced for production.

### Friday Evening

This conference room is ready. You can join the session now.

Join session

#### Recordings

Playback	Recording	Description	Date	Duration	Toolbar
presentation	Friday Evening		Fri, 4 Mar 2022, 4:17 PM EST	2	

Import recording links

#### Navigation

- Home
- Dashboard
- Site pages
- My courses
  - Learn-IP Training Modules
    - Participants
    - Badges
    - Competencies
    - Grades
    - General
    - Training Module 1
    - Training Module 3: Transformation of cultural heri...
    - Training Module 2
      - Live Session 1

Image 3: Screenshot. Learn-IP Online Platform. The recorded session can be easily found in the respective module section. The Big Blue Button as an effective synchronous communication learning tool was installed by INI-Novation Bulgaria

Home Dashboard Events My Courses This course

Hide blocks Standard view

### Adding a new OU blog to Training Module 1

#### General

Blog name

Intro

Rich text editor toolbar with icons for bold, italic, list, link, unlink, image, video, audio, and help.

Allow comments (if chosen for post) Yes, from logged-in users

Individual blogs No (blog together or in groups)

Maximum visibility Visible to participants on this course

#### Navigation

- Home
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    - Participants
    - Badges
    - Competencies
    - Grades
    - General
    - Training Module 1
    - Training Module 3: Transformation of cultural heri...
    - Training Module 2
    - Training Module 4
    - Training Module 5: IPR Strategy and Business Devel...
    - Training Module 6: How to build value-chains to va...
    - Training Module 7: How to finance the

Image 4: Screenshot. Learn-IP Online Platform. Blog was installed by INI-Novation Bulgaria

### 2.3. Benefits for the trainers

The platform enables the delivery of online training, with the trainers interacting live with learners by sending learning resources, encouraging self-reflection by providing support and guidance, and keeping online journals.

The preparation of learning activities can be carried out either synchronously or asynchronously, either online or offline thanks to an implemented open-source web conferencing system for distance education. It depends on the trainer's workflow and training delivery.

Learn-IP trainers can create from and within Moodle links to real-time online classrooms. Trainers can specify the title, description, calendar entry, groups, and details about the recording of the on-line session (*Image 2*). The system supports real-time sharing of slides (including whiteboard), audio, video, chat, Emojis, breakout rooms and screens. It also records all content for later playback. Recording is allowed (up to 1GB).

Only the trainer has the right to post learning resources and to add learning activities. The learning units can be easily posted by using "drag & drop" by the trainer. Trainers can describe their training content as PDF files, online quizzes and supporting multimedia materials. They can present the content in modular chunks that will be able to provide just-in-time learning. Because our online platform is based on Moodle, it allows trainers to create a hierarchy of courses.

The trainer can upload and use interactive content such as presentations, videos and other multimedia, questions, quizzes, games, assignment options for assessment and more. The trainers can submit multimedia files up to 20 MB. If the multimedia content takes up more space, it can be submitted to YouTube as private content and a link can be set using the "URL" tool.

The URL module enables a trainer to provide a web link as a course resource. Anything that is freely available online, such as documents or images, can be linked to; the URL doesn't have to be the home page of a website. The URL of a particular web page may be copied and pasted or a trainer can use the file picker and choose a link from a repository such as Flickr, YouTube or Wikimedia (depending upon which repositories are enabled for the site). There are a number of options for displaying the URL, such as embedded or opening in a new window, and advanced options for passing information, such as a learner's name, to the URL if required.

The training content can easily be updated and posted as follows: PDF module (drag and drop), URL link, Forum, Blog.

Trainers can also benefit from a special evaluation tool called “Feedback on Training Module XY”. The feedback activity allows the trainers to create and conduct their own surveys to collect feedback from the students on the learning process.

#### 2.4. Benefits for learners

Learners can participate in online learning activities and/or self-learning activities according to his/her preferences. The platform supports multiple learning styles and learners are free to choose which learning activity to undertake first.

Learners can easily find and download the learning material as a learning resource for self-learning or blended learning. When they log into the online campus, they can see all the learning activities that have been designed by their trainers. However, learners cannot submit learning content, but rather consume the modules and interact with their instructors (synchronous and asynchronous). Of course, learners can send both to each other and to their trainers, any digital content (files), such as word-processed documents, spreadsheets, images or audio and video clips according to the trainer's requirements.

Communication with trainers or other learners is easy and can be done depending on the needs and learning scenario through the above-mentioned and described tools “*Chat*” and “*Messages*”.

In addition, the “Big Blue Button” is a virtual learning environment which allows learners to participate in synchronous learning, which means that the trainer and learners are logged into the virtual learning environment and interacting with each other at the same time. This module provides learners with asynchronous communication tools, such as whiteboard and chat capabilities.

Learners can easily move from one learning activity to another and trainers can monitor their progress.

#### 2.5. Evaluation of the LEARN-IP training material by heritage managers and cultural tourism representatives

The **LEARN-IP** training material was evaluated several times in order to provide the highest quality:

- in a workshop for future trainers of the **LEARN-IP** partnership
- in six so called Multiplier Events and representatives / stakeholders of the cultural heritage sector and the cultural tourism sector
- with two so called focus groups representing heritage managers and cultural tourism actors.

Each evaluation event was carefully analysed and improvements were done in the training material.

## 3.0 Guidelines for trainers – the Trainers' Kit

The **LEARN-IP** Trainers' Kit consists of three items:

1. The 7 training modules (content of the training)
2. The digital training platform
3. This Trainers' Handbook.

The previous chapter familiarised you with the main training instrument, the **LEARN-IP** online training environment. As you have seen, the functionalities of the online training platform are offering a broad spectrum you can choose of when creating your training on intellectual property rights. The **LEARN-IP** team has collected and created some more tools for you in order to support and accompany your implementation of the training.

The **LEARN-IP** training programme includes seven modules. In the following many helpful tools like

- Exercises
- Good practices
- Drafts
- Templates
- Worksheets
- Checklists

are either presented as instruments which can be used for all training modules or which are allocated to single training modules. Trainers might either download them and use them in their training sessions or get inspired to create their own training material.

The methodological approach is service-driven for trainers: The **LEARN-IP** team would like to support you in the implementation of training units in order to motivate as many training providers as possible to address the topic of IPR. It is assumed that you are familiar with pedagogical-didactic approaches, that you already apply them successfully, and that the following tools serve to accompany them operationally.

## 4.0 Modules' overarching support tools

### 4.1 Organisation of a training on intellectual property rights

As an experienced training provider or trainer, you know how to organise a successful training and you certainly know the advantages and disadvantages of face-to-face, online and hybrid events from your practice. In the following, we will therefore limit ourselves to giving you a few recommendations that are tailored to the topic of property rights and whose observance should be helpful. The following applies to all training formats:

- Very few training providers will be experts in the legal aspects themselves, so you should **involve experts who have a professional background and experience.**

- In your announcement, **communicate as precisely as possible which property rights will be addressed**: it can be a general introduction or very specific content. This is important to avoid creating false expectations that cannot be fulfilled.
- **Ask your registered participants about their specific needs** before the training (see template below) so that you can prepare yourself and other trainers in the best possible way.

### Recommendations on the organisation of face-to-face training sessions

You can be sure that the participants in your training will have special stories to tell when they take part in your training. These can be bad practices, e.g., complaints about property rights of third parties being violated or the misuse of property rights. The will to develop an own IPR plan can also be behind the participation in your event. **Give these stories space and time, because there should be examples from practice that you can pick up on in the training.** This form of exchanging experiences is easier to implement in a face-to-face event than in online events.

### Recommendations on the organisation of online training sessions

Since the COVID-19 pandemic, many sectors of work have learned to organise themselves online - including the education sector. This was not an easy step to take in the field of training for cultural heritage-related issues, as it has traditionally been offered in face-to-face classes, and with good reasons.

Here are some tips on how to organise a successful online event:

- **Use the LEARN-IP training platform** <https://moodle.learn-ip.eu>, which is made available to you free of charge by **LEARN-IP**. You can use this platform to organise your online training offer and also add your own content, as described above.
- If you decide to offer an online course such as a one-day seminar for individual modules via providers such as Zoom, Webex, Microsoft Teams or similar, **consider integrating professional technical support**. Such support is especially advisable if you are planning group work or want to include additional tools such as small surveys or digital coffee breaks. This will free you up for your pedagogical work.
- Offer a short **technical check shortly before the training**. The majority of your learners will be used to working with online tools, but in the heritage sector, there are still sites with bad internet access or learners with less experience. Such a check also gives you the security that everything will work, especially if you are working with new or innovative tools. Better check before!
- For online training events offered for heritage managers the **European project HERITAGE-PRO developed a manual**. Here the authors share their experiences and provide a step-by-step procedure for a [successful training event](#). Similar manuals and tutorials you will find on the internet and on YouTube but there is only a very small number linked to the cultural heritage or cultural tourism sector considering the European environment.

### Recommendations on the organisation of hybrid training sessions

Hybrid events, in which a training is offered as a face-to-face event and online at the same time, is a complex and demanding matter. If you decide on that, we strongly

recommend the **involvement of professional technical support**. Especially the inclusion of interactive training elements which work onsite and online at the same time are challenging and need experience. In this case, please **consider twin trainers** – one for the onsite part, one for the online part.

#### 4.2 Drafts of press releases for communication of the training

Press releases are a good instrument to inform interested parties about a training event. You might consider to send a press release with respective informative to your local, regional or national newspapers, broadcast or TV providers, but you may also include bloggers or send an information to institutions which have newsletters which are regularly sent out. In any case:

Before writing a press note, you must be clear about the subject and why you want to send it.

A press release should be no longer than two pages. In that space, you should summarise your news, back it up with verifiable facts or figures, include a statement, and leave your contact details.

Put yourself in the reader's shoes and imagine that you find that news in the newspaper or in the digital media, and ask yourself if you would read it.

#### **Be brief, to the point, and attractive**

Be direct, do not fill in gaps with redundant information, and do not use language that is inaccessible to the journalist. Use a direct tone and no linguistic algorithms.

#### **STEP 1: HEADER**

The head of the note is extremely important as it's the ticket to either being read or ending up in the trash!

If you have a company or an institution motto or a slogan you can also include it.

Identify the document with the title, PRESS RELEASE.

Include the sending date.

Should you include any photography? It depends on what you consider more appropriate. You can include an attractive image in the header. Remember that, "a picture is worth a thousand words" and pictures (free of rights!) are often welcome in print media.

#### **STEP 2: HEADLINE**

This is possibly the most complicated point. How can you summarize your information in one sentence and make it attractive enough that it will hook the journalist?

The first paragraph of the body of text should link directly to the headline without repeating the same sentence. The idea is to summarise the content that will be developed next.

What's really important about the information you're sending out? That's what should be the headline!

Recommendations for writing a good headline:

- Round up any numbers.
- Try not to include your brand name.
- Don't use more than 10 words and write it in 2 lines. If you use more words or write it in 3 lines that's fine, but not as eye-catching.
- Highlight the headline with a special font, a larger size or in bold.

### STEP 3: TEXT LEAD

This is the first paragraph of the press release. In four or five lines, it needs to contain the most important information. The journalist should be able to know whether your press release is newsworthy of not just by reading this.

The style of the entry is usually bold.

In journalism, the rule of the five Ws is used:

- What: What happened? What's the story? What's going on?
- Who: Who is involved? What institution? What individuals?
- When: When did it happen? When will it happen?
- Where: Where did it happen or where is it going to happen?
- Why: Why does the reader care?

These are the five classic questions, but two more could be added to this list:

- How?
- For whom?

If you answer these questions, you'll be able to set the priorities of your release. However, it isn't mandatory to answer all the Ws in the entry. Select the most important ones (as few as two or three, or maybe even just one) and develop them into one paragraph.

Follow this outline to build the entry:

- Answer each question on a sheet of paper.
- Number it according to its importance.
- Write the entry using the most significant Ws.
- Then, detail the rest of the Ws in the body of the information, in the order you have established.

### STEP 4: BODY TEXT

The exercise of giving priority to the Ws is what is known in journalism as "the inverted pyramid". It is about giving a logical order to the content. The idea is to start with the most relevant information, develop it in more detail, and go down your pyramid to the least important.

The base of the pyramid is the beginning of the news, so you should look for data that covers the content, or figures that can be contrasted. The idea is to argue and expose the relevance that each W has.

Include quotes, especially if they are statements from important people in the sector or from a person with a high position in the institution. In this way, you will add a human element to what you are saying and express closeness to the medium and the reader. But make sure that the quote emphasizes the core idea of the news.

Always include a link to the data sources. Without having numbers or evidence in front of them, there is no reason for people to believe what you say.

**In short, one idea = one paragraph, and the ideas should go from the most important to the least.**

### **STEP 5: BOILER PLATE**

Summarize in a maximum of 10 lines of text brief information about your institution. This serves as a small biography about your entity: the activity you're involved in, when it was set up, and what makes you unique. This is the place to put out your marketing message on intellectual property rights.

### **STEP 6: CONTACT DETAILS**

Remember, this is essential if they're interested in publishing and need more information from you!

- Name and surname
- Position
- Email address
- Telephone number
- Website

### **STEP 7: ADDITIONAL MATERIAL**

Attach photos, links to your institution's videos or dossiers with more information. This should be quality material that will make the task easier for the journalist.

### **STEP 8: LAYOUT**

For the journalist the most important thing is the content. But, as with everything in life, image matters a great deal. Design must never tarnish the content; it should act as an incentive to encourage reading - elegant but not overdone. As a general rule less is more, but always take care of the details, too.

#### **TEMPLATE FOR A PRESS RELEASE**

This template is focused on the format of the press release. It is an example for communicating the content of the **LEARN-IP** training and should be adapted to your course(s) on intellectual property rights.

#### **HEADER**

Heritage Sector / Cultural Tourism in Urgent Need of Knowledge on Intellectual Property Rights

## HEADLINE

A new training scheme for cultural heritage professionals and tourism professionals puts information on intellectual property rights into focus. Developed by a team of five public and private European training providers, heritage and tourism professionals and lawyers in the framework of the Erasmus+ **LEARN-IP** project, the training includes content on the identification of assets, transformation of assets into intellectual property, opportunities and barriers, strategy, business development, value chains and financing sources.

## TEXT LEAD

Intellectual property rights are already an important and highly sensitive topic in cultural heritage and tourism institutions and will continue to gain in importance in the future. Unfortunately, they hardly play a role in the formal education of heritage managers and tourism professionals, which makes it all the more important to impart knowledge in vocational training. A capacity-building training scheme for professionals in cultural heritage management and cultural tourism has been developed in the framework of the Erasmus+ project **LEARN-IP** and is now part of the training portfolio of (your institution). The new training scheme aims at training these professionals in the relevance and operation of intellectual property rights management in their sectors.

## BODY TEXT

The training scheme is offered by (your institution) for up skilling the knowledge of heritage and tourism professionals and consists of seven modules dealing with the topics of intellectual property rights and how to make them beneficial for managers. The process leading to the elaboration and publication of these modules was a long and collaborative one, involving project partners but also experts in the field who tested the materials. The modules are available on a user-friendly training platform and are offered in different courses according to the needs of interested parties.

## BOILER PLATE

(Your institution) will offer 2 sets of courses in 2023. They are offered in small working groups and accompanied by experts who contribute additional legal advice that can be tailored to the needs of the course participants. Registrations are possible until XXX. Further information can be found in the attached flyer and online at XXX.

## CONTACT

Name & surname  
Project coordinator  
Email: name@company.com  
Homepage: URL  
Phone number

Note: Use your business paper for the press note. Attach a flyer or any other (printed or digital) information to the press release.

### 4.3 Drafts of social media content

Social media can be a very good instrument for trainers for reaching interested persons and groups but it takes time to organise and communicate respective content. Therefore, choose the social media platforms that best suit your communication purpose, formats and target audience and build a social media content plan where you can foresee:

- Time planning: date of the posting(s)
- The subject of the posting (“save the date” for a course, announcement of the agenda, “last minute registrations”)
- A link to your institution / the course
- An image/video (strongly recommended!)
- Posting responsibility within your team
- The deadline for the information provided
- Social media platforms on which specific content will be posted

Try to engage in on-going campaigns (e.g. using the corresponding hashtags and/or following the specific guidelines by the campaign promoter). Identifying fairs and “world days” that relate to cultural heritage or cultural tourism is a good practice which allows training providers to plan an engagement with campaigns around those world days.

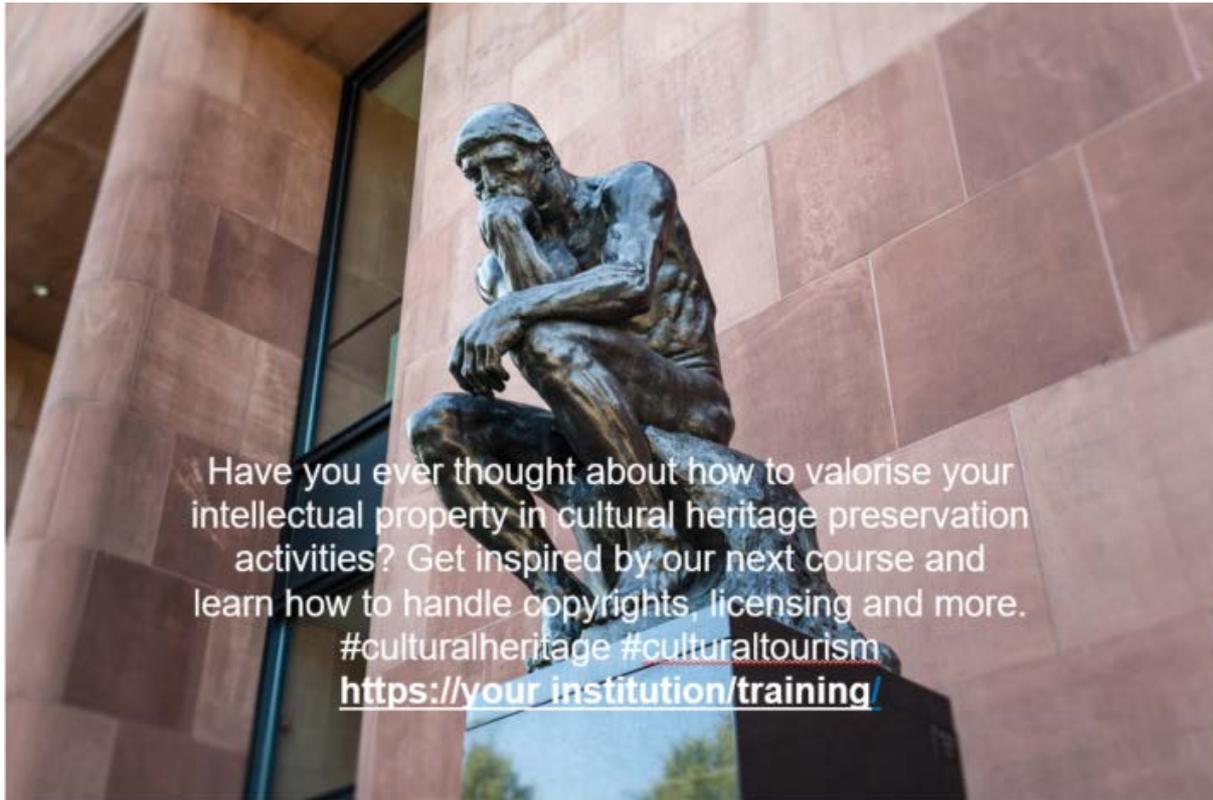
Check the multipliers in your network: Who is active on social media and has built a significant community? Can you ask for help to spread the word about a specific course, publication or activity?

Create dissemination packages or “cheat sheets” to provide stakeholders (i.e. your organisation’s board members) with ready-to-use materials that they can use to disseminate your course.

Here we illustrate some real examples of social media content. These are typical tweets of up to 280 characters (Twitter limits each post to 280 characters). However, this can be adapted to different social media platforms. Facebook, for instance, allows much longer posts.

**Main text of the post.** Try to keep it simple and straight to the point. Use direct formulas that stimulate conversation. Getting the audience’s (positive) reaction is the definitive thing we want to achieve in social media. Remember to insert **hashtags** in your phrasing. You can also use additional hashtags at the end of your message. Keep posts short and provide a **link** for further information.

**Examples:**





**Visuals** are always encouraged, as they get higher engagement than text-only posts. Social media “postcards” or self-explanatory images combining image and text are a good idea to make your posts more attractive.

Consider that most social media offer link previews, which in a way function as an image or audio-visual element. For instance, if you link to a YouTube video, you'll probably like to have the preview of the video so that people can directly click on the frame to play the video – in this case, you don't need to (and shouldn't) include an extra picture, as it would eclipse the video.

A lot more about the communication in social media specifically linked to the cultural heritage and cultural tourism sector you will find in the training material of the two European projects [HERITAGE-PRO](#) (on cultural heritage) and [EUROPETOUR](#) (on cultural tourism) which are explained in more detail in the Resources section below.

#### 4.4 Drafts for invitations to targeted interested parties in the training

Depending on which channel you use, there are different kinds of invitations and naturally an invitation on Facebook looks different than an invitation sent in a letter. In the following, a draft invitation is presented which includes all those references linked to intellectual property rights.

You may use this announcement as an invitation

- in a letter to your clients
- published on your homepage
- as an attached file in an online newsletter to a distribution list of interested parties
- via a link on social media.

Please see the essentials of an announcement which you might adapt to the communication channel:

#### **2 half-day online course**

##### ***Intellectual property rights for cultural heritage institutions (Date, time)***

***Level: beginners***

*(you must attend each day to complete the training)*

*Are intellectual property rights such as copyright, licences, designs, brands or patents a closed book for you? Do you want to know how you can use them as a heritage institution? This two-day (online) course will provide you with the basic knowledge you need. It will be taught over 2 morning sessions. It has been developed and is offered by (your institution) based on training material of the European project LEARN-IP and under the inclusion of legal experts in intellectual property rights.*

*The course is designed for anybody responsible for intellectual property rights who is working in, or for cultural heritage organisations and wants to learn to handle these issues. It will focus on the importance of property rights, and how compliance can be embedded within*

*your organisational practices. This training is suitable for individuals without a legal background who would like to gain an understanding of property rights.*

### **Who is this training for?**

- *Cultural heritage managers including curators, collection managers, licensing managers, communication managers*
- *Religious heritage managers*

### **What will you learn?**

- *Understand the latest developments in (your country's) legislation and across the EU, and how these affect your heritage site*
- *Learn about statutory, regulatory and operational requirements*
- *Determine the role of intellectual property rights in your heritage site*
- *Assess the role of a IPR officer during the changing working environment as a result of COVID-19*
- *Analyse and assess the role of IPRs in your institution*
- *Evaluate the role of risk management in your organisation as part of your IPR practices*
- *Establish practical strategies to ensure your organisation makes use of IPR in the most beneficial way*

### **What's included?**

- *Comprehensive learning materials*
- *Opportunities to network in break out rooms*
- *Regular breaks*
- *Frequent Q&A opportunities*
- *Certificate of completion*

### **Your Course Trainers**

*The course will be held by*

*(XY, expertise)*

*(XY, expertise)*

*(XY, expertise)*

*Agenda day 1*

*(include your agenda)*

*Agenda day 2*

*(include your agenda)*

### **Learning objectives**

- Identify your training needs
- Address ownership issues in your heritage site
- Learn how IPR are implemented in (your country)
- Evaluate how to clear your rights and establish a respective management
- Develop practical strategies

**Maximum number of participants:** (to be chosen)

### **Who are we?**

(Your institution) is a long-time and experienced training provider for cultural heritage institutions covering their training needs. (Add more and explain your expertise in IPR training)

### **Disclaimer**

The contents of the course are based on the assessment of (your institution) at the time the course is run. It should not to be considered legal advice. If such legal advice is required, the opinion of a suitably legally qualified professional should always be sought.

### **Cancellation policy**

- 0 – 10 working days = X % of the course fees
- 11 – 20 working days = X % of the course fees

**If you wish to cancel your booking please get in touch with us directly via (your e-mail address and phone number)**

Please see our privacy policy (include a link to your privacy policy).

## **4.5 Agenda for a training event**

The agenda of your event will depend on the level of content which you would like to train: beginners – advanced – experts. You can use the course description above to guide you in formulating the agenda and thus the content of your course.

## **4.6 Evaluation and feedback sheets for validating the outcome of the training**

You can carry out an evaluation of your training on two levels:

- by checking the learning outcomes and
- by providing feedback on your learners' satisfaction with the course itself, e.g., by asking them about their learning speed, media equipment or concentration.

In any case, you should provide an evaluation of the learning content for your learners, preferably in such a way that they can see for themselves what they have achieved in terms

of learning objectives and where there is still a need. If you use the **LEARN-IP** learning platform, you can ask your learners to do exercises or answer a quiz at the end of each training module. This is an effective way of checking learning outcomes – for you as a trainer as well as for the learners. You might also organise the evaluation of the learning outcomes as a test or homework. Additionally, the **LEARN-IP** training platform offers a tool for the evaluation of the training outcome. It is called “Feedback on Training Module XY...” and you can install it in each training module which your learners should work on.

Another way to assess the satisfaction of your learners is a feedback sheet that also provides you with valuable information for repeating the learning event. For online training sessions, there are many free tools on the market which you can use, e.g. [MIRO](#). Survey templates are available from tools like Google Forms, SurveyMonkey, Typeform, Jotform, SoGoSurvey, SurveyPlanet, Zoho Survey, Crowdsignal. Please see our “Best of...” list in the resources section.

Of course, you can also use your own learning assessment tools that have proven successful in your work context.

## 5.0 Tools and instruments for single modules

All training modules were created by the European **LEARN-IP** team of intellectual property legal experts, business developers, vocational training providers and players in creative industries, cultural heritage, and cultural tourism sectors based in five European countries: Germany, Spain, Romania, Bulgaria and North Macedonia. During the development, they were evaluated by a pool of 20 European experts who gave valuable input for amendments and improvements. Additionally, the training was presented in online and face-to-face seminars to interested stakeholders in order to assure that their needs are recognised and considered.

Due to the complexity of the topic, the **LEARN-IP** team decided to support training providers who are interested to offer the training on the market with additional tools in order to support the uptake of the training. These are exercises and a collection of already existing tools which are described below. Additionally, it is strongly recommended to include the good practices which are included in the training modules in any training activities.

Please find the following suggestions:

### 5.1 Module 1: Introduction to the learning curve of intellectual property rights in cultural heritage and cultural tourism

This module gives a general introduction to the project and the relevance of intellectual property rights for cultural heritage and cultural tourism. The learning path for the valorisation of intellectual property rights is clearly described and visualised in order to give you as a trainer an overview how to lead your learners through the learning process.

It is strongly recommended to start any training activities by checking the learning path!

## 5.2 Module 2: How to identify assets in the cultural heritage and tourism sector

This module is addressed to heritage managers and cultural tourism professionals and first introduces the terms “cultural heritage” and “cultural tourism” as they are used in the context of LEARN-IP. It explains the term “asset” which plays an important role in the context of intellectual property rights. It then goes on to discuss the potential of heritage assets for cultural tourism, and learners will gain insight into how to identify assets and make use of opportunities from assets. With some good practices and numerous exercises learners can reflect and deepen their understanding and knowledge.

### Tools and instruments to be used in the training of Module 2

#### Exercise 1

Please identify for your field of work (heritage management or cultural tourism) assets that you think are unique to your region. Which of these assets are already used for tourism?

Assets that you think are unique to your region	Which of these assets are already used for tourism?

#### Exercise 2

Which cultural heritage asset do you regard as specifically interesting for visitors to your region?

Which cultural heritage asset should gain more interest from visitors to your region?

Which cultural heritage asset do you regard as specifically interesting for visitors to your region?	Which cultural heritage asset should gain more interest from visitors to your region?


### Exercise 3

Following the steps described in unit 3, please identify the potential cultural heritage or tourism assets that can be subjects to IPR in your region:

#### **Step 1. Identification of possible assets**

- What are possible assets for you?
- Create a list of experts who could help in the identification of possible assets

#### **Step 2. Identification of the needs**

Identify the needs of the environment where you would like to identify assets:

- Think about the theme (cultural, religious, gastronomic...) and possible target group/s of either an existing product or one to be developed
- Check what kind of cultural or tourism products/brands are already registered in your region

#### **Step 3. Analysis of the existing demands**

- Think about what kind of tourists/visitors come to the area where you would like to brand/register a product
- Analyse 3 or 4 similar products to the already identified product you would like to promote/protect (same area, same target group, same theme) and think about what would distinguish your product from the already existing ones

#### **Step 4. Analysis of the legal framework of the country/region**

- Check if there are any restrictions for registering the product/brand you have in mind
- Adapt your idea to the current legislation to avoid problems

#### **Step 5. Analysis of the promotion channels**

- Investigate what channels are the most efficient to spread the product locally/nationally/internationally
- List components of tourism supply in the area where you would like to promote your product/brand: attractions, transportation, accommodation, activities, etc.
- These components will be in use by different types of tourists. Decide whom you want to reach, which would be your ideal target group

#### **Step 6. Definition of your product line**

Decide on the main characteristics of your product/brand

- Theme and specific topic of the product/brand
- Specific location where the product can be found - for visits (tourism attraction), attendance (event) or purchased
- Specific characteristics
- Features of authenticity

**Step 7. Identification of possible intellectual property rights**

- Try to identify some possible rights which you might use for your product.
- In the LEARN-IP training Module 3 you will find an overview of respective instruments.

**5.3 Module 3: Transformation of cultural heritage and tourism assets into intellectual property**

This module provides a guided tour through intellectual property rights (IPR) and their application to cultural heritage and tourism assets. After a general introduction of properties of IPR, various kinds of industrial property rights and copyright are introduced and illustrated with examples. This knowledge is then applied to the field of cultural heritage and cultural tourism. Criteria and strategies are developed which allow identifying the most appropriate IPR for a specific asset. The prerequisites, necessary steps to obtain protection, and the estimates of occurring costs are presented.

**Tools and instruments to be used in the training of Module 3**

**Exercise 1**

Make a list of goods and services which belong to cultural or tourism assets which you already offer or would like to monetize. For each listed item, write down the IPR which could be used for its protection. Consider that more than one IPR could be useful.

Goods and services which belong to cultural or tourism assets which you already offer or would like to monetize	IPR which could be used for its protection


### Exercise 2

Pick an object, which for the purpose of this exercise you consider selling to customers locally or via the internet. Imagine a possible trademark which you could use. Remember that the trademark needs to have distinctiveness and should not be purely descriptive. Conduct a trademark search at your national trademark office and/or the European Union Intellectual Property Office to find out if there might be conflicting third-party rights.

Object	Possible trademark	Outcome of trademark research

### Exercise 3

Think of products in your field of work with a unique and special visual appearance and which might be accessible for a design protection.

Products with a unique and special visual appearance	Accessible for design protection? Yes / no / why?

## 5.4 Module 4: How to identify opportunities and overcome barriers for utilising assets

This module presents the importance of the cultural heritage and tourism assets as an opportunity for developing economic benefits. It focuses on how to identify opportunities for its protection and utilisation. It examines the identification of the barriers and the importance of precaution measures for the third-party IPR related to cultural heritage and cultural tourism assets. It enables learners to develop a sustainable cultural tourism business in a protected cultural environment. This module is a valuable reference to be added to the skills and knowledge learners develop through practice and experience.

### Tools and instruments to be used in the training of Module 4

#### Exercise 1

- Map the historical buildings of your town or area. After reading this module visit them and analyse them as possible assets, for your area and for you. Find who manages the one of your choice.
- Contact that person and listen to his/her needs. This is valuable information for you. Find what programmes of activities they have. If none, find what could be feasible to be hosted in it.
- Then create a strategy targeted at what you can bring to them to be activated. Maybe you can even find the cultural manager of the site or museum who will also bring you vital information about his/her perspective and goals to bring the space or institution closer to the citizens.

#### Exercise 2

- Analyse the asset you have identified and identify the right IPR you could use to protect it (see Module 3)
- Once identified, don't forget to protect your idea/proposal/activity with IPR before you set up any meeting to present it.
- Now is your time to come back to that person with something to be added to their calendar

#### Exercise 3

- Do some research in your Local Tourism Office. Ask them about the most visited destinations or sites. Which are the most demanded activities by visitors?

- Take part in at least a couple of them (preferably in all of them) Now that you have experienced this activity and you are also listening and studying the reactions and comments of the visitors, as well as your own. Is something missing there so that you could bring added value to the activity/destination?
- Now, the protection of your idea is a must. Obtain the professional information you need, and then proceed with your IP protection.
- Time to visit your Local Tourism Office again and present your offer.

### 5.5 Module 5: IPR strategy and business development

This module explores the principles of an IPR strategy in the cultural heritage and cultural tourism sector: It provides an answer to the question of what to do after registration of IPR for certain cultural tourism or heritage products or services. Furthermore, it explores the general question of how to “exploit” cultural heritage and cultural tourism assets and to bring economic benefits to the stakeholders, including the local community. Finally, this module opens new horizons to the learners regarding the latest trends in digitization specifically for the cultural tourism and heritage sectors.

#### Tools and instruments to be used in the training of Module 5

The exercises along with the good practices from the module can be used as tools and instruments:

##### Exercise 1

Which of your products can be subject to Intellectual Protection Rights Protection? Think of the possibilities for their internal and external exploitation and write the instrument that can be used for few products/items. Please write them down and describe them.

##### Exercise 2

Use the business model template within Unit 2. Sub-Unit 1. Analyse your organization from a business aspect and define the following segments:

- What are your key customers
- Value Propositions
- Channels
- Customer Relationships
- Revenue Streams
- Key Resources
- Key Activities
- Key Partnerships
- Cost Structure

##### Exercise 3

Analyse your products/services or your organizations offering to the audience in terms of products/services as defined Unit 2. Sub-Unit 2. Try to define the usage of the three key elements. How are they satisfying your customer needs and wants?

#### **Exercise 4**

What are the items of your collection or your organizational collection that can be digitized and how? Are there any obstacles for their digitization? Please write them down and describe them.

#### **Exercise 5**

Read the good practices within the Module. Try to relate to each good practice and how the activities/models/measures can be “replicated”/used in the case of your cultural heritage/tourism organisation or business.

#### **Tool 1. Business Model Canvas**

The Business Model Canvas is a strategic management template used for developing new business models and documenting existing ones. It is a one page document which works through the fundamental elements of a organization/business or product, structuring an idea in a coherent way. It will help the learners to test their knowledge within Unit 2 of the Module

DRAFT

BUSINESS MODEL CANVAS				
KEY PARTNERS	KEY ACTIVITIES	VALUE PROPOSITIONS	CUSTOMER RELATIONSHIPS	CUSTOMER SEGMENTS
<p>Who are our Key Partners?</p> <p>Who are our Key Suppliers? Which Key Resources are we acquiring from partners?</p> <p>Which Key Activities do partners perform?</p> <p><b>MOTIVATIONS FOR PARTNERSHIPS:</b></p> <p>Optimization and economy, Reduction of risk and uncertainty,</p> <p>Acquisition of particular resources and activities</p>	<p>What Key Activities do our Value Propositions require?</p> <p>Our Distribution Channels? Customer Relationships? Revenue streams?</p> <p><b>CATEGORIES:</b></p> <p>Production, Problem Solving, Platform/Network</p>	<p>What value do we deliver to the customer?</p> <p>Which one of our customer's problems are we helping to solve?</p> <p>What bundles of products and services are we offering to each Customer Segment?</p> <p>Which customer needs are we satisfying?</p> <p><b>CHARACTERISTICS:</b> Newness, Performance, Customization, "Getting the Job Done", Design, Brand/Status, Price, Cost Reduction, Risk Reduction, Accessibility, Convenience/Usability</p>	<p>What type of relationship does each of our Customer Segments expect us to establish and maintain with them?</p> <p>Which ones have we established?</p> <p>How are they integrated with the rest of our business organizational model?</p> <p>How costly are they?</p>	<p>For whom are we creating value?</p> <p>Who are our most important customers?</p> <p>Is our customer base a Mass Market, Niche Market, Segmented, Diversified, Multi-sided Platform</p>
	<p><b>KEY RESOURCES</b></p> <p>What Key Resources do our Value Propositions require? Our Distribution Channels? Customer Relationships Revenue Streams?</p> <p><b>TYPES OF RESOURCES</b> : Physical, Intellectual (brand patents, copyrights, data), Human, Financial</p>		<p><b>CHANNELS</b></p> <p>Through which Channels do our Customer Segments want to be reached? How are we reaching them now? How are our Channels integrated? Which ones work best? Which ones are most cost-efficient? How are we integrating them with customer routines?</p>	

COST STRUCTURE	REVENUE STREAMS
<p>What are the most important costs inherent in our business model?</p> <p>Which Key Resources are most expensive?</p> <p>Which Key Activities are most expensive?</p> <p><b>IS YOUR BUSINESS/ORGANIZATION MORE:</b> Cost Driven (leanest cost structure, low price value proposition, maximum automation, extensive outsourcing), Value Driven (focused on value creation, premium value proposition).</p> <p><b>SAMPLE CHARACTERISTICS:</b> Fixed Costs (salaries, rents, utilities), Variable costs, Economies of scale, Economies of scope</p>	<p>For what value are our customers really willing to pay?</p> <p>For what do they currently pay? How are they currently paying?</p> <p>How would they prefer to pay?</p> <p>How much does each Revenue Stream contribute to overall revenues?</p> <p><b>TYPES:</b> Asset sale, Usage fee, Subscription Fees, Lending/Renting/Leasing, Licensing, Brokerage fees, Advertising</p> <p><b>FIXED PRICING:</b> List Price, Product feature dependent, Customer segment dependent, Volume dependent</p> <p><b>DYNAMIC PRICING:</b> Negotiation (bargaining), Yield Management, Real-time-Market</p>

## Tool 2. Product level

*Reflect on your products or services: What are the needs and expectations of your customers? How do your products or services satisfy your customers and their needs and expectations? How is your product or service solving the problems that your customers are having? What are your product levels? Write them down!*

Definitions	Your service/product level
<p>The <b>core benefit level</b> affects the need of the customer (example: cultural experience)</p>	
<p>The <b>actual product level</b> affects the expectation of the customer (example: Spanish Art and Craft Heritage)</p>	

The **augmented product** affects customer demands for additional services or benefits often bringing meaning and experience to the customer (example: exploring online through a digital 3D tour or Augmented Reality)

### 5.6 Module 6: How to build value-chains to valorise cultural heritage and tourism intellectual property

This module explains how value chains can be developed specifically with intellectual property assets and what needs to be considered. Targeted learners are stakeholders from cultural heritage as well as cultural tourism. They should first become aware of what value chains are and the serious role they can play. The competences and skills that will be developed include, in the first step, the identification and analysis of value chains. The next step is the integration of intellectual property rights in value chains and their beneficial use in terms of economic, social, environmental, and sustainable effects. For both sectors, this is presented and discussed in respective impacts.

#### Tools and instruments to be used in the training for Module 6

The following tools and templates are drafted ready-to-use in your training sessions:

#### Exercise 1: Check your marketing mix

In sub-unit 1.5. of the training module 6 you were made aware about the marketing mix as a precondition for intellectual property generation. Which of the measures indicated there are already part of your marketing mix?

Measure	Partner/s

#### Exercise 2: Create a value chain for a product or service

In subunit 2.1 of training module 6 an example is given how to map a value chain. Transfer this example into a case of your own environment and try how far you get. Consider in every step if and how to include IPR.

### Exercise 3: Map your own value chains for cultural heritage

Have you ever thought about mapping your value chains? This template will help you to outline and visualize it according to the four core elements presented in unit 1 / sub-unit 1.2 of training module 6: Creation, Production/Publishing, Dissemination/Trade and Exhibition / Reception / Transmission. Map your own value chain to better understand the values you might work with:

LEARN-IP Value Chain mapping template
<p><i>Creation</i></p> <p><i>Example: Describe an example from your work</i></p>
<p><i>Production/Publishing</i></p> <p><i>Example: Describe an example from your work</i></p>
<p><i>Dissemination/Trade</i></p> <p><i>Example: Describe an example from your work</i></p>
<p><i>Exhibition/Reception/Transmission</i></p> <p><i>Example: Describe an example from your work</i></p>

### Exercise 4: Map your own value chain for cultural tourism products or services

The graphic presentation from sub-unit 1.3 in training module 6 can also be used for mapping value chains in cultural tourism. Give it a try and also think about roles of actors in the value chain!

### Exercise 5: IPR for digital cultural tourism offers

Digital offers will continue to play a major role in tourism even after the COVID-19 pandemic has been overcome. This raises new questions for IPR. In this exercise, try to grasp how you will deal with them and include the training content of Module 3 in your reflections.

Your digital offer	What is the right IPR instrument to use for protection?

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### **Exercise 6: Create a roadmap for an integrated approach of IPR in your value chains**

So how do you plan to integrate IPR into your value chain in the future? Think about this and create a roadmap as described in LEARN-IP module 3 (“Transformation of cultural heritage and tourism assets into IP”).

### **5.7 Module 7: How to finance the creation of IP assets in cultural heritage and tourism**

This module presents the professional approach to financing the protection and commercialization of cultural heritage and cultural tourism assets. Funding these activities is one of the most important considerations to take into account, but not many stakeholders in the field of culture and tourism in Europe are trained in the art of fundraising. This module, therefore, provides broad and detailed information on the different funding models that exist, as well as on funding sources for the various steps in the phases of intellectual property protection and exploitation. Finally, this module introduces the different forms and unique features of the financing opportunities available and illustrates those with examples, with references to good practice and with references to further reading.

#### **Tools and instruments to be used in the training of Module 7**

As mentioned above, all good practices and the exercises, included in the module, can be used by a trainer as training instruments:

#### **Exercise 1. Checklist for preparing and testing intellectual property marketing materials**

Intellectual property (IP) is a valuable business asset that learners can use to generate revenue (e.g., through licensing) or as a value to negotiate partnerships. The first step in getting the most from it is identifying the types of intellectual property the learner owns, then building an IP strategy to support the business strategy. Since business cases should be supported by proper IP dissemination, the learner is asked to prepare a so called “Marketing Materials Checklist.”

Considering the topic of IPR strategy and its business development the learner should be made aware that this topic is also elaborated in a separate module - Module 5: “IPR Strategy and Business Development” with additional information.

#### **Answers expected from learners:**

Checklist for preparing and testing IP marketing materials:

- Prepare a short headline (that covers what and why)

- Focus on the IP enabled solution to a customer problem (less is more).
- Focus on improvements, not cost reduction only.
- Illustrate (non-confidential) IP benefits.
- Describe the IP asset without revealing confidential information.
- List patents and associated IP like trade secrets, pro-totypes, materials, etc.
- Communicate openness for research and development issues or commercialisation cooperation.
- Research and specify market size and growth.
- Include call(s) to action.
- Identify key people and note contact details.

### Exercise 2. Preparation for applying to obtain IP

Preparing to apply for a patent, trademark or industrial design is an important part of the entire process of obtaining intellectual property rights. Several related questions are provided in this exercise to help learners gain practical experience with their own particular case in mind. The questions are useful for self-training, one-on-one coaching or for coaching delivered by a trainer.

*To the exercise:* Please prepare an application to obtain a patent, or to register a trademark, industrial design or copyright work, by answering the following questions:

What IP assets do I have? (Open text answers)

What is their value to me and my business goals? (Open text answers)

What is my budget? (Open text answers)

### Exercise 3. Applying for EUIPO funds „Ideas powered for business SME”

The third exercise focuses on applying for EUIPO funds which are explained in detail in Module 7. Knowledge of this fund and the opportunities it provides is of practical benefit to learners. Here, learners are asked to prepare to apply for the EUIPO 'Ideas Driven by Business SME' funds to get a 50% discount on trademark and design application fees (national, regional and EU). They have to discuss two free answer questions. The possibility of a good answer

suggests that the learners themselves seek additional information about the fund as self-preparation. This is expected to encourage their initiative.

Questions to be answered:

- a) What are the different steps that have to be taken?

Open text answer with a list of steps

- b) Please prepare a list of required information that has to be submitted:

Answer: Checklist for required information

Additionally, three good examples as good practices are provided. It is proven that the learners gain better understanding on a topic by reading such use cases.

### Good practice 1

The first good practice provides information on how the Protected Geographical Indication (PGI) "Bulgarian Rose Oil" has direct and indirect impacts on the regional development and sustainability of the national and international markets of Bulgaria – a geographical place, as a market and as a tourism destination.

### Good practice 2

The second good practice is a showcase for the IP protected product "Strandzha Manna Honey" with PDO and PGI and related business modelling creating news tourism assets and financing for the regions. The IP-enabled financial sustainability mechanism is illustrated with the concrete case on a regional level.

### Good practice 3

There are many ways to raise funds for business ventures, obtaining IP and related IP activities explained in the module, but crowd funding is special. The focus here is mainly on the risks to intellectual property if it is not yet protected. The information is based on the experience of European and UK patent and trade mark lawyers. Finally, a good practice is presented, describing the success of a Bulgarian private company, which protects with its own financial means a trademark of a national festival that presents intangible cultural heritage from the region. Subsequently, the trademark becomes a serious asset that supports further financing of the activity with private and public funds - a good example of a *win-win-win* situation between private interests, cultural heritage and public institutions.

## 6.0 Additional Resources

<b>Get inspired / background literature</b>	
<a href="https://naomikorn.com">https://naomikorn.com</a>	This law firm from the United Kingdom is specialised in IPR issues related to cultural heritage. The company is offering a newsletter with inspiring examples from IPR practices linked to cultural heritage.
<a href="https://naomikorn.com/2022/07/01/industries-who-have-experienced-challenges-during-the-covid-19-crisis-and-the-role-that-ip-has-played-case-study-5-cultural-heritage%EF%BF%BC/">https://naomikorn.com/2022/07/01/industries-who-have-experienced-challenges-during-the-covid-19-crisis-and-the-role-that-ip-has-played-case-study-5-cultural-heritage%EF%BF%BC/</a>	This case study on industries linked to the cultural heritage sector shows how they have experienced challenges during the Covid-19 crisis and the role that IP has played. The study reflects on the high relevance of managing intellectual property rights in order to better cope with crises like the Covid-19 pandemic.
<b>Resources especially for IPR purposes</b>	
<a href="https://ipkitten.blogspot.com/">https://ipkitten.blogspot.com/</a>	Launched in 2003 as a teaching aid for Intellectual Property Law students in London, the IPKat's blog has become a popular and inspiring source of material, comment, and amusement for IP owners, practitioners, judges, students, and administrators.
<a href="https://naomikorn.com/resources">https://naomikorn.com/resources</a>	Naomi Korn Associates has developed free and openly licensed copyright, licensing and data protection help resources. These are suitable for staff working in cultural heritage and are available under the terms of a Creative Commons Attribution Share Alike Licence to enable free access and reuse.
<b>Resources for online training</b>	
<a href="https://heritage-pro.eu/training-module/heritage-pro-concept-digital-training-camp/">https://heritage-pro.eu/training-module/heritage-pro-concept-digital-training-camp/</a>	This is a manual for online training in cultural heritage-related fields developed by the European <a href="#">HERITAGE-PRO project</a> . You may download the guidelines for free.
<a href="https://www.europetour.tips/results/training-modules/">https://www.europetour.tips/results/training-modules/</a>	In the European project <a href="#">EUROPETOUR</a> training materials for cultural tourism were developed which are generally linked to IP issues. Especially, the training on communication is a helpful source for disseminating information to the cultural tourism community. The material can be downloaded for free.
<b>Resources for the implementation of a course</b>	
<a href="https://www.jotform.com/form-templates/event-feedback-form">https://www.jotform.com/form-templates/event-feedback-form</a>	Via this page, you have access to different feedback templates which you can adapt to your needs in an IPR seminar.
<b>Evaluation tools</b>	
<a href="https://www.wordstream.com/blog/ws/2014/11/10/best-online-survey-tools">https://www.wordstream.com/blog/ws/2014/11/10/best-online-survey-tools</a>	A good list with detailed information on the advantages of tools like Google Forms,

	SurveyMonkey, Typeform, Jotform, SoGoSurvey, SurveyPlanet, Zoho Survey, Crowdsignal
<a href="https://www.onlineassessmenttool.com/">https://www.onlineassessmenttool.com/</a>	This free creator of assessment tools is also a good source for creating your own evaluation tool.

## 7.0 About LEARN-IP

These Guidelines for trainers are part of a digitally supported training programme for intellectual property rights valorisation in cultural heritage and cultural tourism sectors, developed within the European project **LEARN-IP - Intellectual Property Rights and Geographical Indication Training for Cultural Heritage and Cultural Tourism** funded by the Erasmus+ funding scheme 2020-2022.

All materials were created by the European **LEARN-IP** team of intellectual property legal experts, business developers, vocational training providers and players in creative industries, cultural heritage, and cultural tourism sectors based in five European countries: Germany, Spain, Romania, Bulgaria and North Macedonia:

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- Bucovina Tourism Association, Romania  
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- INI-Novation Bulgaria OOD, Bulgaria  
[www.ini-novation.com](http://www.ini-novation.com)
- Macedonian Enterprise Development Foundation, North Macedonia  
[www.mrfp.org.mk/mk](http://www.mrfp.org.mk/mk)
- Sociedad Regional Educación, Cultura y Deporte S.L, Spain  
<https://srecd.es>
- Tergau & Walkenhorst Patentanwälte | Rechtsanwälte, Germany  
<https://tergau-walkenhorst.com>

You can find more information on the homepage: <https://learn-ip.eu/>



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