



WORLD CULTURES CONNECT

Enhanced Learning Resource Pack

Planning & Managing Projects

One in a series of e-learning resources aimed at helping arts practitioners and creative organizations prepare for international working

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Overview

Following intensive training workshops held around the world supporting professional development and international mobility under the Culture Works programme, World Cultures Connect E-Kit Resources have been created to allow arts and cultural professionals to access a selection of the wealth of tools we use in our training sessions online.

The training is aimed to increase artists' and creative practitioners' current practice and explore how to access local and international markets, how to progress professional development, marketing and business plans, the benefits of digital tools, networks and innovations, and new opportunities for connecting and collaborating with audiences and partners.

We have a unique practice-based approach to professional development and support, and in this respect these tools are most beneficial as part of a second phase of development for those who have taken one of our courses in-person, however they are also excellent supplements for good practice in assessing and building your creative business at any stage.

We also encourage readers to create a profile on World Cultures Connect - our digital hub for international arts and cultural professionals - to join the existing community, promote their work, discover new ideas and intelligence, and connect with new partners, audiences and markets.



Who is this Resource for?

This support resource has been written with individual arts practitioners, creative collectives and small arts organizations in mind. More specifically, it is intended for use by anyone responsible for getting an arts product, service, event or programme 'made' and 'out there': whether it is producing a show, staging an event, holding an exhibition, engaging audiences, running a workshop or making a film.

That said, the exercises here can be just as useful for management teams to work through, as they are for arts organizations run by 1 person. In either case, it helps to discuss the outcomes of these exercises with peers and colleagues – encouraging you to reflect openly and honestly about how you might improve your current practice or revise a project idea to make it more feasible, impactful or profitable.

This guide does not wish to add unnecessarily to an already long list of things-to-do when working on a project. Rather, it hopes to help streamline the planning and management process – helping to clarify the steps required to get something off the ground. It encourages you to take a moment out from juggling balls and seeking funding, to take stock of what you are doing, why you think you should be doing it, how realistic your plans are, and how you might make things easier on yourself – to the benefit of you, your peers and the work itself.



How to Use this Resource

Our World Cultures Connect E-Kit Resources have been designed as support materials for artists, creative practitioners and arts-based collectives to employ during the planning and management of all kinds of projects, no matter their size or complexity. They comprise a selection of some of the exercises participants on our training programmes have suggested were the most useful to them in planning and effecting their own projects. They have been successfully employed by artists and practitioners across the world to affect significant and profitable change in their approach to managing projects, promoting their work, engaging audiences, accessing new markets, forging partnerships and growing their business.

The pack as a whole also offers a framework for assessing and refocusing your current activities; although depending on the stage you are at on any specific project, the exercises can be 'dipped into' and worked on individually. They are organised relatively chronologically, around the main stages of planning, managing and reviewing a project. But we recognize that every project is different, and as with all good planning 'tools', you are encouraged to adapt and tailor them to your own needs.

They are intended to be worked through at your own pace. They are designed to be undertaken either alone or alongside your colleagues, where the only real 'rule' is that you give the tasks ample time for completing and reviewing, and a commitment to being honest with yourselves about the current state of things.



BUSINESS SNAPSHOT

This board is a useful way of easily reviewing what kind of business model you currently work within, the main operational resources you need to keep the business going, your organizational structure and key plans for the short and long-term growth of your practice.

It does not require you to have in-depth business or financial management skills – just a willingness to sit down and spend 20 minutes thinking through your current practice from an objective point of view.

The Business Snapshot can help identify areas that are in need of some change or reevaluation, including pinpointing those activities and issues that take up a disproportionate amount of your time and divest energy from achieving the central goals of your organization. It will also aid new market and creative innovation.

BUSINESS / ORGANIZATION NAME:		
KEY ACTIVITIES What are your artistic 'offerings'? What is it you are producing or delivering to customers, audiences and participant groups?	VALUE CHAIN - illustration Map out how the various modes in which you produce work (whether it's a workshop, a new 'show', a commissioned song, organising events, running a exhibition for others). Do you provide a service (hired in as a director or a teacher?), deliver 'goods' (writing to order; or selling paintings), or manage a space for audiences and other artists to interact in some way.	
MONETIZATION At what point is money raised, and through which activities?		
OTHER REVENUE STREAMS	WHO ARE YOUR CUSTOMERS?	HOW DO YOU ENGAGE YOUR CUSTOMERS?
STAFF & ORGANIZATIONAL STRUCTURE	RESOURCE REQUIREMENTS What do you need to continue producing these 'offerings'?	KEY ASSETS



PLANNING TEMPLATE

This board will help you plan for and keep track of all the components involved in the planning and realization of a project.

It assumes that you have already thought through the overall 'vision' and purpose of your project, the key features and meanings of your 'offer', its target audiences and the brand.

It can be used with additional templates designed to help you plan each element in more details i.e. the Risk Assessment; Audience Experience and content engagement plan; Marketing & Communication plan; budgets and financial projects.

The suggested lists of questions is not exhaustive, and you are encouraged to spend time thinking through every aspect of the project, and the people involved, resources required and potential impacts (intended and otherwise) at every stage of its planning, realization and review (i.e. before, during and after the 'event').

PLANNING TEMPLATE



MISSION STATEMENT?

If you do not already have one, take time to complete the other sections first, review the key sections on a) what it does b) value & experience and c) impacts In order to start thinking through how to describe the nature of the project succinctly in 1 or 2 sentences.

WHO IS INVOLVED?

Key Partners

- Who are your main partners, suppliers, funders or stakeholders?
- What are the reasons for their investment or partnership effort?
- Is an artist or artistic body the key partner?

WHAT DOES IT DO?

Key activities, functions, content

- What are the key activities of your project? i.e. dance show i.e. What is your central 'offer'?
- What auxiliary activities are your offering? i.e. workshops?

WHERE & WHEN IS IT?

These factors may not be immediately obvious, and will depend on what you are seeking to achieve, other stakeholders' needs and your resource requirements (incl. funding). If this is the case, note down what those influencing factors are and what your 'idea' dates and location might be.

VALUE & EXPERIENCE

- How will people experience your offer?
- What makes your project different? i.e. contemporary circus, live music, multi-skilled performers, international cast; First Maltese circus troupe at Edinburgh Fringe
- What are the values driving these activities?
- What is *meaningful* about your offer for audiences?

WHO IS IT FOR?

- Who is your key target audiences?
- What is the potential size of your audience?
- How do your target audiences compare to those expected by the partners / venue?

HOW & WHERE WILL THEY ENGAGE?

Audience relationships

- How will people find, engage with, share or pay for your offer?
- At what point will audiences be *participating*?
- What relationship are you planning for your target audience? – one-off or longer-term?

Marketing and Channels

- Through which channels do you plan to reach your audience and at what points in time?
- Who will be managing the different parts of your marketing campaign?
- What do you need to provide your partner with, in order to aid their own marketing activities?



WHAT WILL IT NEED?

Key Resources

- What resources are needed internally to deliver and manage the project over its entire lifetime? From planning and preparation, producing, selling and marketing, cleaning up and evaluation.
- Do you need external suppliers or expertise and if so, of what type? i.e. audience research, ticketing, video production, designers
- What staff will you need to make this happen? Can you involve volunteers? Will cast need rehearsing? Do you have to pay for the rehearsal space? Travel? Parking? Catering?

WHAT WILL IT COST?

Cost Structure

- What will be the internal costs in terms of money and people?
- How much funding is coming from elsewhere and does it have conditions?
- What other resources will be required and for how long?
- Will materials and marketing be paid for by partners?
- How much money do you *really* need?
- What 'in-kind' support might you be able to achieve?

IMPACTS & QUALITY

- What are the core business / commercial targets?
- What are the intended outcomes of this project?
- What are the core revenue streams and what are your financial forecasts?
- What will be the broader social, cultural and media impacts of your project?

MEASURES

- How will you measure success and achievement of objectives?
- Do you have processes in place to capture, document and record key quantitative measures, and audience/stakeholder feedback?
- Is ongoing monitoring factored into your project plan?
- Who is responsible?

BUSINESS / PROJECT NAME:

MISSION STATEMENT:

**WHEN & WHERE
WILL IT HAPPEN?**

WHAT DOES IT DO?

**VALUE &
EXPERIENCE**

**HOW & WHERE WILL
PEOPLE ENGAGE?**

WHO IS IT FOR?

WHO IS INVOLVED?

WHAT WILL IT COST?

IMPACTS & QUALITY

MEASURES



ACTION PLAN

The Action Plan (or Task List) template is a simple, but very useful way of organizing the key activities required to get a project up and running. Crucially, it can help you identify which tasks or activities should be 'actioned' straight away, and those which may not be immediate priorities.

Project planning is fundamentally time-driven, requiring continual review of how what you choose to do today, will impact on the successful realization of a project in the near or distant future. Critically, effective planning demands clarity of purpose (i.e. the 'bigger picture'), deep understanding of intended/projected outcomes and detailed foresight (the 'nitty-gritty').

Using this template, and returning to it on a regular basis, will encourage you to remain focused on the practicalities of making something happen, from the moment you start planning a project until the day it has been completed.

It is recommended you produce an Action Plan for each of the core components of your project – perhaps structured around those used in the previous Business Planning Template - specifying:

What action or change will occur

Who will carry it out

When it will take place, and for how long



ACTION PLAN

Make a point of Naming / dating each version of the list. You may decide to do this on a weekly basis, depending on the length of the planning period – ensuring that even when ‘to do’ lists are being produced on a daily basis (as is often the case), that a more formal and structured

PROJECT NAME:	DATE:	Version
review of ‘where you are at’ and who should be doing what, is clearly recorded somewhere centrally.		

These action lists can be used in combination with any and all of the planning templates contained in this pack.

#	Task / Action <i>What</i>	Duration	Start Date	Deadline	[Cost]	Assigned To <i>Who</i>	✓
1							
2							
3							
4							
5							

Action Plans can be ‘departmentally’ or function-specific i.e. one focused on production and another on marketing. Or, you may wish to include additional detail regarding:

- **Resources** (i.e. money, staff) needed to carry out the change

STAKEHOLDER MAPPING

No matter how big or small your project is, no matter how short or long it is, it will impact on a range of people, variously involved at different times and affected in different ways.

PRIMARY stakeholders are those who have made some form of investment (money, time or otherwise) in a project, event, organization or programme and without whom it would not exist. This might include employees, volunteers, sponsors, suppliers, spectators, attendees and participants.

SECONDARY stakeholders are those who can and may be affected by the activities of an organization or outcomes of an event or project.

Primary stakeholders may be 'internal' or 'external' to the organization or core project team, requiring different degrees of information relating to the progress of a project depending on the depth of their involvement.

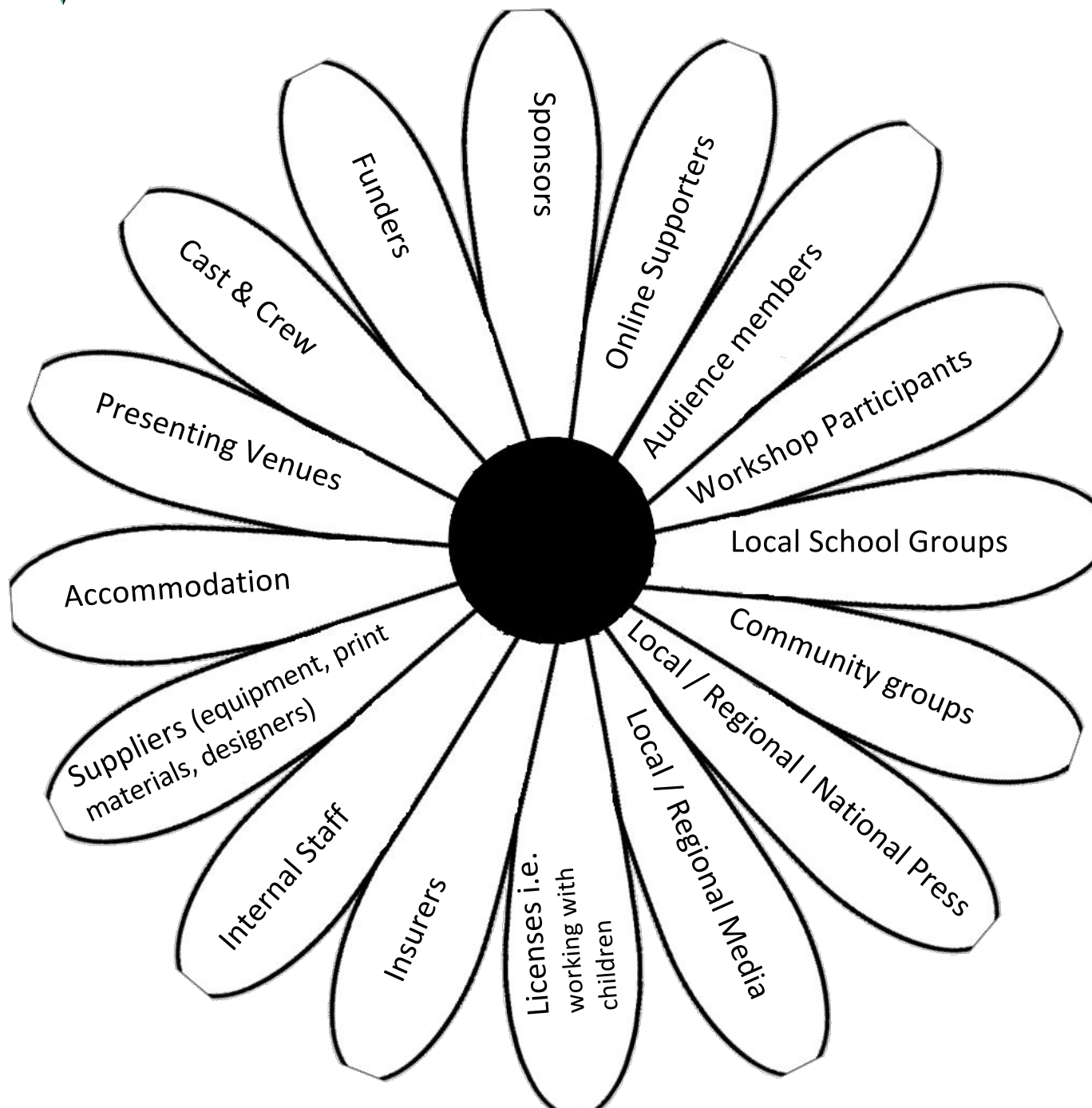
INTERNAL stakeholders might include senior managers, artistic collaborators, marketing, IT, design, finance and other colleagues. Some of these will need regular and detailed information on progress but others will simply need high-level updates.

EXTERNAL stakeholders may include funders, sponsors, suppliers, outsource design and possibly artists or performers themselves.

For more definitions about
Stakeholder groups, see:
www.stakeholdermap.com/



STAKEHOLDER MAP



Use this daisy wheel template to map out the categories of stakeholders involved either directly or indirectly by your project.

Make a point of thinking through the project from all angles, and the kind of people who may be impacted before, during and after the project has been completed. This is particularly important when embarking upon events or projects involving community outreach.

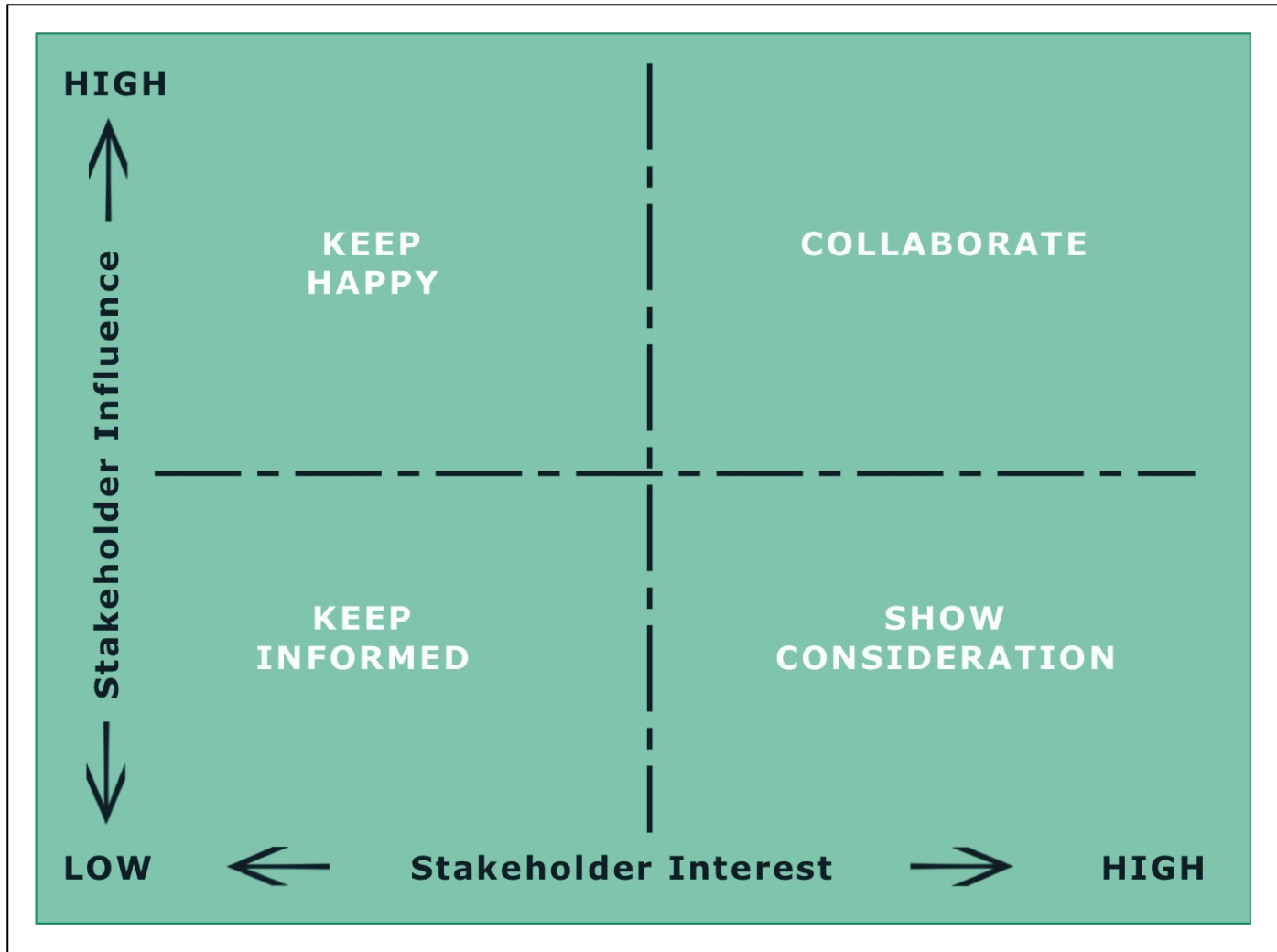
You can add as many 'petals' as necessary – or choose to develop separate daisy wheels for different categories i.e.

- Audiences
- Providers/suppliers
- Influencers: i.e. media and local interest groups

The simple example provided is for a regional children's theatre show with accompanying workshops.



STAKEHOLDER INFLUENCE MATRIX



Taken from:

Arts Council England (2015) Making Digital Work: Digital toolkit for Arts & Culture

Once you have a clearer idea of who your core stakeholders are, you can start identifying the degree of involvement they are likely to want or expect in the project.

Mapping them within this matrix will help you determine the kind of relationship you might want to maintain with them, on the basis of how much influence they might have on the successful completion of the project.

In the previous example, the theatres themselves have both a high interest and considerable influence on the successful staging of the show, and should be considered collaborators and will therefore be part of an ongoing conversation. The Front of House staff at the venues, on the other hand, will be involved (high interest) but have only minimal influence on the show going ahead.

PROJECT OBJECTIVES

Aims:

Aims are statements of intent, written in broad terms. They set out what you hope to achieve at the end of the project. The Aims of your project will explicitly support the Mission Statement, and will describe broadly the main aspirations of your Project Plan.

Objectives

Objectives are specific statements which define measurable outcomes; They detail the steps you will take to achieve your stated aims. Objectives should be S.M.A.R.T.. That is, they should be:

Specific: clearly numbered

Measurable: easily demonstrated and monitored

Achievable: within the current climate

Realistic: within resource levels available

Timed: set to an agreed timescale

The following **SMART** canvas is useful for setting out what your key project objectives will be. Once pinned down, these objectives will drive how you manage and prioritise resources, undertake evaluation (and determine what 'success' looks like), and provide *the* framework determining how you plan and implement your project.



SMART OBJECTIVE TEMPLATE

SPECIFIC		MEASURABLE	AGREED	REALISTIC	TIMELY
What, specifcially, is to be achieved?	What are the specific actions that need to be taken?	What will be the key tangible measures of success?	Who needs to agree with this action to ensure its successful completion?	How realistic is it that this action can be fully achieved (given other pressures & constraints)?	What is it that makes this the right time to be persuing this action?



IMPACTS CANVAS

What are impacts?

Impacts encompass a variety of positive benefits and negative impacts which might accrue as a result of a project happening. They may be apparent during the planning stage, whilst the project is happening or after completion.

They may be felt by a variety of stakeholders, including participants, local businesses and the host communities; all of whom may feel these impacts differently.

Some are, of course, intended; such as increasing awareness or understanding of some particular social issue; or increasing attendance at a local arts-center or participation amongst young people. Others may be related to the environment or physical infrastructure, to the economy (of your organization or the wider sector), or be political in nature.

It is important to acknowledge the affect of your undertaking any project on, not only your organization and your immediate audience, but also the wider community. Social media and digital technology is making it increasingly possible to learn of these broader impacts after the fact; but in developing effective monitoring and evaluation into your funding applications and planning stages, impacts should be considered right at the start of your project.

Using the Impacts Canvas

Taking time to consider the likely impacts on *all* of your stakeholder groups, at the beginning of a project, will significantly help you identify what kind of evaluation tools you will need in order to assess your project – and, indeed, where and from whom you might want to collect such information.

The impacts canvas provides a relatively straightforward way of thinking through what the likely intended impacts and side-effects of your project might be on its core target audiences and your broader stakeholder groups. It works most immediately as a way of assessing the positive and negative consequences of your project *after it has happened*.

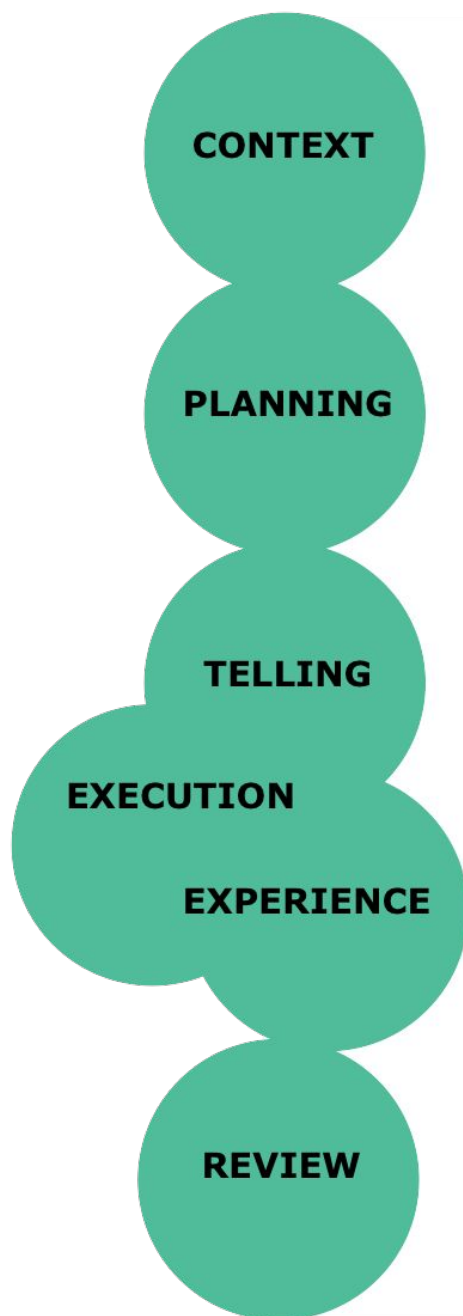
However, because it asks you to also consider any background motivations or ideas that may have impacted on your project (such as those driving influential stakeholder groups or political developments of which you were not previously aware), this is a good way of keeping track of how the actual outcomes of project change over time, relative to the aims and objectives identified during the planning stages. The next page outlines a way of thinking through your project in terms of a 'routemap'. It posits that different stages may effect different kinds of impacts in different ways.

The Impacts Canvas was developed after Hiller's (1998) discussion of impacts as 'Linkages' and duly acknowledges his research in the area of events.
Reference: H. Hiller (1998) 'Assessing the Impact of Mega-Events: A Linkage Model', *Current Issues in Tourism* 1:1, 47-57



IMPACTS CANVAS ROUTEMAP

STAGES OF YOUR PROJECT



CONTEXT: What is the context for this project? What were the key needs, ideas or beliefs that brought this project into being? What is its intended purpose, and in whose interests was it embarked upon?

PLANNING: What impacts have been felt - either by the team itself, partners or in the course of the project's creative or technical development and planning stages?

TELLING: Marketing, promoting, 'selling' & communicating the project to audiences and publics - where decisions about how you talk about your work, with whom and where, have their own impacts.

EXECUTION: The doing & making of the project - putting on the show, running the event, undertaking the workshop programme.

EXPERIENCE: Thinking about your project from the perspective of its core audience and participants. How does what they feel, think or do *during* or as a result of your project constitute an impact? Also consider how that experience might then extend beyond the formal completion of the project: how might people continue to think about, use and engage with your project long after the 'event' itself? How might they *share that experience* with their peers and other communities?

REVIEW: Considering the ways in which you will be evaluating your project - from its planning to its execution - how will this have consequences for those 'captured' in the stories you tell about it, future articulations of this or other projects, and 'data' you produce and report on?



IMPACTS CANVAS

BACKGROUND FORCES

Powerful, important and influential ideas or beliefs justifying the project or rationalizing your aims

CORE PROJECT AIMS

Make a note here of your intended project outcomes (key objectives).

CONTEXT

PLANNING

TELLING

EXECUTION

EXPERIENCE

REVIEW

FORWARD IMPACTS Impacts occurring during the project and as a direct result of the project happening

Stakeholder Group	Type of Impact	+/-	Short / Long Term

PARALLEL IMPACTS Side-effects residual to the project itself and not directly under the organiser's control

Stakeholder Group	Type of Impact	+/-	Short / Long Term

MoSCoW Prioritisation

The MoSCoW technique provides an extremely valuable tool for prioritising the various resource requirements and key activities involved in developing a project throughout its different stages.

Developed by Dai Clegg of Oracle Consulting, it offers a relatively straightforward way of determining what is essential to making the project a success and what is perhaps less critical and can be omitted if necessary. It asks you to actively consider the risks involved over the course of your project, and keep you focused on the impacts of decisions relating to resources on your stakeholders and on the core objectives of your project.

1. Use the tool to first list the resources *available* to you and the limitations these may place on your project – including time constraints, human resource capacity and, of course, funds.
2. Then, prioritise the various elements involved in planning and managing your project according to the four priority levels:
 - M**ust have – fundamental to project success
 - S**hould have – important but may not be critical to success
 - C**ould have – can be left out without damaging the project
 - W**on't have – can be left out for now but may be done later.



MoSCoW PRIORITISATION CANVAS

PROJECT NAME:

TIME CONSTRAINTS:

BUDGET CONSTRAINTS:

RESOURCE CONSTRAINTS:

MUST HAVES

Fundamental to project success

SHOULD HAVES

Important but may not be critical to success

COULD HAVES

Can be easily left out without damaging project

WON'T HAVE

Can be left out for now but may be done later = More of a 'would like to have but won't have during the timeframe of this project'



PROJECT STATUS UPDATE

Monitoring how your project is developing should be an ongoing activity. The Action Plan (or task List) is one way of doing this. Another is to regularly return to the Project Planning Template. Certainly, you should routinely check how the decisions you make work in service of achieving your core Project Aims and Objectives.

One way of doing this is to schedule in regular review sessions, recorded in a status report or project update which can then be sent to key team members, and returned to during final evaluation.

The following template can be used to log the status of the project as a whole, or adapted for a specific operational area of your project. On a theatre show, this might be production *or* marketing *or* funding, for instance. It is useful to note down both the accomplishments or milestones reached in the project up until now, as well as the issues affecting the project running to schedule. In identifying the key problems or stumbling blocks, you should also identify a solution – even if it involves scheduling a separate session to unpick the issue and find ways of tackling it. In any case, it is recommended that this status update be used as the basis of a mid-project Action Plan.

The status update should consider technical aspects of the project, as well as any processual/management/administrative elements.



PROJECT STATUS UPDATE

PROJECT NAME:		
Project Manager:		REPORT DATE:
Project Start Date:	Project Completion Date:	Project Progress: <small>As % of time, or weeks</small>
Snapshot Evaluation: <small>Delete as necessary</small> Unsatisfactory Satisfactory Outstanding		Project Status: <small>Delete as necessary</small> Behind Plan On target Ahead of plan
MILESTONES / ACCOMPLISHMENTS <small>List the successful completion of major tasks and progress made on key deliverables.</small>	ISSUES <small>Issues that require a response, but should not prevent the project running on schedule.</small>	ALARMS <small>Critical Issues keeping you from delivering on schedule. Likely to require help from outside the core project team.</small>
	Solutions & Deadlines:	Solutions & Deadlines:

Note: Planning to Evaluate

Perhaps the most critical review stage is that which takes place once the project has been completed. This is the point at which you are required to take (final) stock of how things went, to evaluate whether the project achieved what it set out to do, and if not, what might have been the reasons. The purpose of evaluating projects is twofold: one is to be *accountable*, and to justify the existence and/or continuation of a project. The second is about *improvement* and providing critical insights to aid the development of this or future projects.*

This E-Resource is not the place for a detailed and comprehensive discussion of evaluation methods, project measurements or research techniques [see our forthcoming E-Pack]. Instead, it encourages you to allocate time at the very earliest planning stage, to figure out what might be the 'kinds of evidence' you need to evaluate the success of your project. Questions that need to be asked during planning include:

- Who will have overall responsibility for evaluation?
- How much will evaluation cost in time and money? Is it listed in the budget?
- At what points during the project should we collect data for future evaluation activities and how?
- What are the key measures of success, relative to the project's main aim and specific objectives?
- Are these 'goal posts' acceptable to all partners, funders and producing stakeholders?
- Do they take into account what might be achieved in the short and long term?
- How will unexpected outcomes or impacts be recognized and valued?

* Hughes, J. & Nieuwenhuis, L. (2005) *A Project Manager's Guide to Evaluation*, Evaluate Europe Handbook Series Volume 1