

PROJECT MANAGEMENT TOOLKIT FOR ARTS AND CULTURE





ADVANCING AFRICA'S CREATIVE SECTOR PROJECT MANAGEMENT TOOLKIT FOR ARTS AND CULTURE

Credits

CONCEPTUALISATION

ARterial Network

COMPILATION AND EDITING

Chris de Bruyn, Manager: Institute for Arts Management and Development, North-West University, South Africa

FINAL EDIT AND PROOF-READING

Fran Cox, Project Manager, South Africa

ADDITIONAL RESEARCH AND WRITING

Patricia Kyungu, Arts Administrator, Kenya and South Africa

PUBLISHED BY:

ARterial Network
Union House, Second Floor
25 Commercial Street
Cape Town 8001, South Africa

Translation:
Espera Donouvossi

Layout and cover design:
OffCentre Design

Printed by:
RSALitho

Contributions, with grateful thanks to:

Aadel Essaadani:
Performing Arts Institute and Morocco Jazz Festival,
Morocco

Faisal Kiwewa:
Bayimba Cultural Foundation and Bayimba International
Festival of the Arts, Uganda

Ijeoma Loren Uche-Okeke:
Center for Contemporary Art, Nigeria

Jiggs Thorne:
House on Fire / Bushfire Festival, Swaziland

Joy Mboya:
GoDown Arts Centre, Kenya

Khadija El Bennaoui:
Art Moves Africa, Morocco

Mark West:
CAP Events, South Africa

Sinda Ouertani:
Centre for Arab Women Training and Research, Tunisia

Yusuf Mahmoud:
Sauti za Busara Music Festival, Zanzibar

Yvette Hardie:
Out The Box Festival, South Africa

September 2011
ISBN: 978-09869900-2-1

DISCLAIMER:

While every care has been taken to check the accuracy of the information contained in this publication, the owners and publishers do not guarantee the completeness or accuracy of its contents, and may not be held liable for any loss incurred by users of the Toolkit.

CREATIVE COMMONS LICENSE

The Toolkit will be distributed under Creative Commons License Agreement: ARterial Network remains the owner of the publication but the content therein may be shared, copied and distributed for NON-COMMERCIAL PURPOSES only and clear acknowledgement of the source i.e. ARterial Network Project Management Toolkit for Arts and Culture, must be given at all times.

The editor and compiler wishes to acknowledge, through superscript numbering linked to the biography, the writers of those specific parts of this toolkit.

FOREWORD

ARTerial Network is a continental network of artists, cultural activists, arts NGOs, cultural enterprises and others committed to developing African music, dance, theatre, literature, craft, design, visual art and film in their own right, and as means to contribute to democracy, human rights and development in Africa.

ARTerial Network recognises the important and integral role of arts and culture in the development of the African continent, a sector that brings meaning to people's lives and contributes to their livelihoods. However, the potential of the sector is largely unrealised in most African countries due to challenges related to governance i.e. severe limitations in leadership, management and administrative capacity in effectively managing the available resources, the adopted policies and the abundance of talent in the broader good of society. Much needed skills such as entrepreneurship, project management, fundraising, advocacy and marketing are particular areas identified as being underdeveloped by practitioners on the continent.

Over the years, ARTerial Network has hosted three "winter schools" on arts advocacy and networking in Cape Town, South Africa (2009), Yaounde, Cameroon (2010) and Bamako, Mali (2011). At each 7-10 day "winter school" – attended by representatives of 17 African countries in each of 2009 and 2010 and from 28 countries in 2011, these challenges were echoed across all five regions within the African creative sector:

1. In a SWOT analysis about the situation of the creative sector in their respective countries, participants listed the absence of cultural policy or the lack of / or poor implementation of cultural policy as key challenges. This had as much to do with a lack of political will, as the lack of knowledge and managerial ability among those officials charged with responsibility for the creative sector at political or bureaucratic levels. The above analysis reflected similar conclusions of delegates at the founding conference of ARTerial Network in Senegal in 2007, as well as those of delegates at a symposium to discuss challenges facing African festivals at the Zanzibar International Film Festival in June 2010.

2. The SWOT analysis identified a lack of leadership as a contributing factor to the absence of effective artists' or professional cultural networks in many African countries; the creative community lacked a coherent and impactful voice to represent their interests.
3. The SWOT analysis repeated the common refrain for practising artists, existing NGOs and aspiring cultural entrepreneurs to be equipped with basic financial, organisational, planning, information technology and project management skills in order for them to better distribute and sustain their products and services.
4. The initial two "winter schools" led directly to the emergence of more than twenty (20) ARTerial Network national chapters across the continent, with the third "winter school" gathering the key leaders of these country chapters to identify and address future challenges. As national chapters emerge and elect their leadership, new leadership potential is identified, but it is clear that – in order for that potential to be realised – effective training programmes and mentorships need to be implemented to ensure that national civil society leaders have the requisite knowledge, skills base and experience to deliver on the expectations of their members.
5. The need to sustain civil society structures in Africa where there is little, if any, public funding support for the arts, makes urgent the need to develop a skilled entrepreneurial leadership who are able to generate income and funding in more creative ways to grow and sustain the sector.

It is in the context of all of the above that ARTerial Network has begun launching a much needed series of Toolkits: an Arts Advocacy and Networking Toolkit, an Arts Fundraising Toolkit, an Arts Marketing Toolkit and now this Project Management Toolkit for Arts and Culture. These are intended to add to the resources for artists on the continent and develop their practices, organisations and the sector in general.

How to organise a seminar, an exhibition, a mini-festival, a conference, a theatre workshop, a music concert: these projects all require basic project management skills



including planning, programmes of action, information technology, financial management, marketing, coordination, technical and other skills. It is hoped that this toolkit will also be used as a training manual on a national and regional level.

The ARTERial Network Toolkit series is produced on the African continent using case studies from the continent for the continent thus reinforcing local ownership and building new knowledge within the African creative sector.

Finally, our work would not be possible without the contributions of our ARTERial Network members and chapters, and support from our core funding partners -Africalia, Doen Foundation, the European Union, HIVOS, Mimeta Foundation and Spier for their sustained support for ARTERial Network. We would like to especially thank the Swedish Institute and Intercult for their generous support in making this toolkit possible.

ARTERial Network Steering Committee

Tade Adekunle, Khadija El Bennaoui, Mulenga Kapwepwe, Telesphore Mba Bizo, Joy Mboya, Filimone Meigos, Patrick Mudekereza, Sarah Nsigaye and Salma Said.



MESSAGE FROM THE SWEDISH INSTITUTE (CREATIVE FORCE)

The Swedish Institute (SI) is a public agency that promotes interest and confidence in Sweden around the world. Working closely with Swedish embassies and consulates, SI seeks to establish cooperation and lasting relations with other countries through strategic communication and exchange in the fields of culture, education, science and business. SI organizes seminars and arranges visitor programs for key people coming to Sweden. The institute also supports Swedish language instruction at foreign universities.

Creative Force is a programme of the Swedish Institute (SI); its purpose is to establish dialogue and creative forums for culture. Creative Force emphasises the importance of culture in international cooperation, in strengthening democracy and in promoting freedom of expression. The aims of Creative Force are to give women, children and young people a greater chance to influence and take part in cultural life, and to highlight freedom of expression, as well as gender equality, and cultural diversity.

Creative Force is a joint program which brings together SI, Swedish missions abroad and cultural practitioners both in Sweden and in our partner countries, as well as Sida's cultural support program, Sweden's joint reform program for Eastern Europe and SI's development cooperation program. Through funding and dialogue, Creative Force is supporting a number of Swedish cooperation projects in Africa, in the Western Balkans and in Eastern Europe. These initiatives embrace many different forms of cultural expression, from neo-circus and contemporary dance to new drama and cinema.

The Swedish Institute (Creative Force) encourages and fully supports the collaboration between ARTerial network and Intercult network; we strongly believe in its future potential. This Project Management Toolkit for Arts and Culture is a positive outcome of this cooperation and we sincerely hope that Project Managers will find this resource useful; providing ideas and methodologies, strategic guidelines, useful templates and examples, case studies, comments and tips from practitioners wishing to share and exchange ideas.



MESSAGE FROM INTERCULT

Intercult is an independent production and resource unit based in Stockholm, Sweden. Operating in Sweden and Europe since 1996, Intercult initiates and leads collaborative culture projects and networks. We also participate in the development of intercultural and international project competence; having an active interest in national and European cultural policy.



Engaging in trans-border cultural projects, we embrace the challenges of contemporary diversity; voices and expressions. As producers and experts, we are able to initiate large scale co-productions, primarily at the European level, although our other objective is to connect local and international initiatives; across disciplines and in multiple partnerships. We bring together artists, operators and audience; creating unexpected encounters.

Our mantra is “We do and share!” Intercult operates actively in several networks, sharing experiences through seminars, conferences, lectures and mentorship. As a Europe Direct office, we have significant experience in managing EU projects and engaging in cultural politics and citizen communication.

Intercult is interested in expanding our activities on the African continent. For many years we have had contacts with African immigrants living in Sweden, building networks and engaging in activities. Our collaboration with ARterial Network is a more strategic step in developing our relationship with Africa’s creative sector. We hope this Project Management Toolkit for Arts and Culture will be a useful information and training tool; raising the competence of managers in the cultural and creative sector. We are proud to be associated with the ongoing development of a strong African creative sector, one with high artistic integrity, local engagement and global relevance.

CONTENTS

SECTION 1 **8**

Much of what we do in the creative and cultural sector is project based; creativity, activities, doings and happenings. Project management is one of the fundamentals to the success and sustainability of this sector.

1. Introduction	9
Tip: Thoughts on Project Management	9

SECTION 2 **10**

Understanding project management: the approach and why arts and culture projects should be managed strategically.

2. What is Project Management?	11
3. Critical Project Success Factors.....	11
Tip: Effective Project Management: Five Laws that Determine Success.....	12
4. Project Management vs. Strategic Project Management.....	13
5. Project Management vs. Events Management	13

SECTION 3 **14**

What characterises a project and the terms most commonly used to describe project processes, actions and role-players.

6. Characteristics of Projects.....	15
7. Project Management Terminology	15
7.1 Milestones	15
7.2 Deliverables.....	15
7.3 Viability.....	15
Tip: Is There a Need?.....	15
7.4 Feasibility.....	16
7.5 Accountability	16
7.6 Responsibility.....	16
7.7 Stakeholder	16
Case study on sponsor benefits.....	16
7.8 Dependency.....	17
7.9 Assumption.....	17
7.10 Constraint	17
Case study on the development of a project.....	17

SECTION 4 **18**

The value of good project management is in the processes and planning, as well as effective leadership and a good project team.

8. The Value of Project Management	19
Tip: Thoughts on Communication.....	19
Tip: Choosing Your Project	20
9. Why Doesn't Everyone Practice Effective Project Management?	20
10. Leading and Teaming	21
Tip: Phases in Teaming	21
10.1 Leadership Styles.....	22

10.2 Qualities of Leadership.....	22
Tip: Thoughts on Leadership.....	22
10.3 Locus of Control.....	23
Tip: Thoughts on a Good Team	23
10.4 Roles and Responsibilities.....	23
Tip: Thoughts on a Good Project Manager.....	23

SECTION 5

24

Practical steps and guidelines that are needed to achieve effective project management.

11. How do I Manage Projects?.....	25
Example: Sauti za Busara Festival work plan.....	25
12. “Think-tank-thinking-it-through-process” - Project Initiation.....	27
Tip: The Seven Essentials of Highly Successful Project Initiations	28
Tip: Project Initiation Questions	28
Tool: Template of Project Initiation Document / Project Charter.....	29
12.1 Managing Project Finances.....	31
Tip: Starting Points for Project Financial Management.....	31
Tip: Working with the Financial Manager	31
Tool: Example of budget line items for an organisation or structure	32
Example: Typical budget for a production.....	33
12.2 Time Management.....	37
Example: Televised production running order.....	37
Tip: Ideas For Saving Time	37
12.3 Risk Management.....	38
Case study on risk management	38
Tip: How to Handle Emergencies.....	39
Tool: Risk assessment document.....	40
13. “Creating-the-to-do-list-and-delegating-process” - Project Planning.....	41
Example: Project survey.....	41
Tool: Project planning task list.....	43
Tool: Template of event fact sheet	44
Example: Event timeline (dinner function)	45
Example: Event timeline (art exhibition opening).....	46
Tip: What to Consider When Catering For Your Event.....	48
Example: Contract with an artist	50
14. “Doing-all-the-to-do-things” - Execution Process.....	53
Example: Out the Box Festival project plan.....	53
15. “Checking-up-and-measuring-up-process” - Control Process	54
16. “Wrapping-up-and-packing-away-process” - Close out.....	55
Tool: Project report template.....	56
17. Bibliography.....	58

SECTION 1

Much of what we do in the creative and cultural sector is project based; creativity, activities, doings and happenings. Project management is one of the fundamentals to the success and sustainability of this sector.

1. INTRODUCTION

Project Management is a professional career for people who have the passion, personality type, drive and the expertise to thrive in the project management environment. It is also something that every person is confronted with at some stage of his or her life. Everyone has to organise a birthday party or a function of some kind. Project management is more part of one's daily life than we realise or even think of. The basic principles of project management can be applied in organising Sunday lunch for a family gathering, managing the school drama competition, organising a national arts festival and building a bridge!

Nothing, or very little, in arts and culture happens outside the framework of project management; creativity, activities, doings and happenings. Project management should therefore be considered as one of the fundamentals of the successful management of the creative sector; crucial to the long-term sustainability of arts and culture and ensuring a sound and stable environment in which artists can be creative. The performing and visual arts, broadcasting, film-making, writing and design for example encompass a range of activities which are economic and need to be managed well to realise effective results.



TIP: THOUGHTS ON PROJECT MANAGEMENT

Without successful project management you compromise both the creativity and professionalism of the project. You run the risk of it becoming a stand alone activity, with little impact beyond the duration of the project.

Faisal Kiwewa.

Director: Bayimba Cultural Foundation and Bayimba International Festival of the Arts. Kampala, Uganda

People managing creative projects have a great responsibility towards all artists, their respective communities and to society in general. They need to manage the creative environment in such a manner that artists in all styles, genres, cultures and languages can dream, create and flourish in the higher order of mankind's needs.

This Project Management Toolkit for Arts and Culture is a contribution towards the sustainability of the creative and cultural sector; we encourage you to use it for reference, for training and for developing your own tools to ensure high standards of delivery and effective projects.

We hope that you will find it useful!



BORROWED WISDOM: CREED OF THE OBSESSIVE, COMPULSIVE PROJECT MANAGER

- If anything can go wrong, Fix It!
- When given a choice - Take Both!
- Multiple projects lead to multiple successes.
- Start at the top then work your way up.
- Do it by the book... but make sure you're the author!
- When forced to compromise, ask for more.
- If you can't beat them, join them; then beat them.
- If it's worth doing, it's got to be done right now.
- If you can't win, change the rules.
- If you can't change the rules, then ignore them.
- Perfection is not optional.
- When faced without a challenge, make one.
- "No" simply means begin again one level higher.
- Don't walk when you can run.
- Bureaucracy is a challenge to be conquered with a righteous attitude, a tolerance for stupidity, and a bulldozer when necessary.
- When in doubt: Think!
- Patience is a virtue, but persistence to the point of success is a blessing.
- The squeaky wheel gets replaced.
- The faster you move, the slower time passes, the longer you live.

SECTION 2

Understanding project management: the approach and why arts and culture projects should be managed strategically.

2. WHAT IS PROJECT MANAGEMENT?

LET US FIRST LOOK AT A DEFINITION OF A PROJECT:

"It is an endeavour in which human, material and financial resources are organised in a novel way, to undertake a unique scope of work, of given specifications, with constraints of cost and time, so as to achieve beneficial change by quantitative and qualitative objectives"⁸

THE ELEMENTS OF THIS DEFINITION IMPLY THAT:

- all projects work with resources which are scarce in the creative and cultural sector.
- all projects have a uniqueness about them.
- all arts and culture projects carry considerable uncertainty and risk.
- the key role of project managers is integration of the above with the mission, vision, goals and objectives of the specific artist / practitioner or organisation.

It is also important to understand that the definition also implies three elements: The **product**, the **facility** and the **project**. *Project management is thus the process by which a project is completed successfully; that is, it achieves its purpose.* Project management is a specific way of thinking; ensuring that all aspects of the project are running in the same direction, in a planned way to achieve the end or completion of a project.

Project management is a series of actions, events and processes that create and deliver a unique product or service. In the shortest terms, project management can be called the science, and the art, of organizing.

PROJECT MANAGEMENT ALSO INCLUDES:

- Application of knowledge, skills, tools and techniques.
- Management of resources to deliver something (a training project or an exhibition for example) often in a limited time frame and with a limited budget.
- Management of change, for example responding to unforeseen circumstances like a transport delay or the cancellation of a venue.
- Planning and controlling; best achieved in a project plan which has timelines and corresponding activities detailing what must happen by when.
- Administration.
- Communication to all stakeholders, both internal (for example the project team) and external (for example sponsors).
- Co-ordination of all the various project requirements and people.
- Satisfying a requirement; usually connected to the objective of the project.

3. CRITICAL PROJECT SUCCESS FACTORS

For a project to be successful there are critical factors that play a vital role. These should be kept in mind when initiating, planning and executing a project. They are:

- **Time**
- **Cost**
- **Quality**
- **Client satisfaction**
(for example the client can be the sponsor)⁵.

Projects are successful when there is:

- Support from top management
- Client involvement

- An experienced project manager
- Clearly formulated goals and objectives
- Clear statement of requirements
- Proper planning
- Realistic expectations
- Competent, hard working, focussed project team members
- Good infrastructure
- Formalised methods of implementing the project
- Accurate assumptions².



TIP: EFFECTIVE PROJECT MANAGEMENT: FIVE LAWS THAT DETERMINE SUCCESS¹⁰

LAW #1: AMBIGUITY KILLS PROJECTS

Ambiguity is the enemy of project success. Clarity is what is needed.

Without clarity there is confusion. Confusion is not hard to find in projects. Look for ambiguities in roles and responsibilities, goals, objectives, requirements, scope, estimates, status reports and more. Each ambiguity is a potential source of conflict, rework and failure.

Make it a priority to seek out and remove ambiguity from every element of your project. Start by reviewing the project scope. Is this as unambiguous as possible? Is everyone clear on what is in scope and what is out of scope? Do not rely on assumptions or memory. Insist on clear communication. Document every important decision. Clarity is everything.

LAW #2: CREDIBILITY REQUIRES DETAIL

Detail is the basis for accuracy in all projects. Plans that lack detail cannot be believed.

Most projects are under planned. They are already late before they start. Project teams that claim not to have time for detailed planning, typically end up working all hours to meet deadlines. Insufficient detail in the plan means time and effort requirements will be underestimated. Only when we get to the detail is the full extent of the work revealed.

If you do not know the detail then you will not have credibility in front of your team. Define what completion specifically means for each task and deliverable. If it is at too high a level, break it down. Avoid surprises. Get to the detail.

LAW #3: NO TRUTH, NO TRUST

Projects are performed by people. And people work together best when there is mutual trust.

Trust does not come free. It is tied to truth. You cannot have one without the other. So trust but verify. Assigning tasks demonstrates trust, but what is sometimes missing is the accountability for results and adequate checks to verify status. Without ownership and truth, we cannot trust ourselves to be focused on the right things.

When you know the truth, good or bad, recognise it, openly. Be honest about the challenges ahead. Reward outstanding commitment and performance. Acknowledge the reality of delays and tough decisions. Do not hide bad news. Tell the truth or face the consequences.

LAW #4: UNCERTAINTY IS CERTAIN

Plans are not crystal balls. Plans are incomplete views of the future, which means they are at least slightly wrong. Most project managers ignore most risks. Yet as sure as the sun will rise, sudden events and changes will occur, triggering changes to the plan. But sudden does not necessarily mean unpredictable. Experience and a little insight will always expose risks that we can plan ahead for.

Ignoring project risks is the first and biggest risk to the project. There is no such thing as a risk free project. Prevent risks where you can and have contingencies ready where you cannot. Expect the unexpected!

LAW #5: SATISFACTION IS NOT GUARANTEED

Projects do not carry guarantees; whatever the customer was told (a customer can be the trainee, the conference delegate, the audience). Satisfaction depends on competence, commitment and communication. Respecting all the preceding laws (1 – 4 above) will count for nothing if competence, commitment and communication are lacking. Project management is a discipline that has to be worked at. Learn as much as you can on each project and then use that knowledge to energise yourself and others on the next project.

Communicate with focus and sensitivity to align the varying interests of stakeholders and your team with the needs of the project. You will need to do this often throughout the ups and downs of the project. This is no simple task! So if you want to be a great project manager then you will need to be an outstanding communicator.

4. PROJECT MANAGEMENT VS STRATEGIC PROJECT MANAGEMENT

Project management is the normal, conventional and standardised manner in which a project is managed. It answers the questions:

- What must be done?
- How must it be done?
- By when must it be done?

Strategic Project management adds the strategic angle to project management. It researches the environment in which the project will be executed, determines weaknesses and strengths of the project and looks for opportunities and threats. Strategic project management plans ahead for all this. It brings a strong focus on the business element in project management and answers the questions:

- Why are we planning what we are planning?
- What will be the result of our decisions?
- What influence will decisions have on the outcome/ result of the project?
- What benefits/profits/income will arise from specific decisions?
- How can we maximise our resources so that we reach our goals and objectives?

It is preferable to work in a strategic manner!

EXAMPLES OF ARTS AND CULTURE PROJECTS

- Shows, concerts, productions
- Festivals of all kinds
- Training projects
- Craft development projects
- Visual arts projects
- Exhibitions of all kinds
- Commercial arts projects
- Filmmaking projects
- Design arts projects
- Website design projects
- Graphic design projects
- Arts development projects
- Arts/culture conferences
- Arts/culture training projects
- Arts/culture advocacy projects
- Arts/culture competitions
- Publishing projects
- Symposia, conferences, summits on arts and culture

5. PROJECT MANAGEMENT VS EVENTS MANAGEMENT

The debate on this topic has been going for a long time. What is the difference between project management and events management? Is there really a difference? Is the one more important than the other? Must events be approached differently?

Events management can be described as the application of the management practises of project management in the creation and development of events.

From our point of view, there is no difference between project management and events management because:

- both apply the same management principles
- both use the same processes
- both have the same characteristics
- both face challenges and risks.

It is only the angle of approach and the environments that differs. Therefore we would like to promote the viewpoint that people managing events in the creative sector are also project managers, managing projects. This not only creates a positive perception change about projects / events in this sector, but it also aligns arts and culture projects to international standards and best practices in project management.

SECTION 3

What characterises a project and the terms most commonly used to describe project processes, actions and role-players.

6. CHARACTERISTICS OF A PROJECT

All projects have some basic generic characteristics that define it as a project. They can include the following:

- an objective
- a finite lifespan (beginning & end)
- a defined and unique product/service
- a corresponding set of activities to construct the product/service
- resources to undertake the activities
- stakeholders
- risks that need to be managed
- an organisation structure with defined responsibilities
- a budget
- a business plan³.

Arts and culture projects often have an event that forms the main focus of the project. For example a project which develops a new design may have a once-off televised launch event.

Projects can also be divided into different phases or stages that will include the different project management processes. Most projects will have three stages:

The preparation stage - including project initiation or scoping and project planning.

The “live” stage - including project execution and in many cases the final “event” of the project.

The “post mortem” stage - including project close out and final evaluation.

7. PROJECT MANAGEMENT TERMINOLOGY

There are many different terms that are used in project management communication. Here are a few of the most important ones⁸:

7.1 MILESTONES

Within the framework of project management a milestone is a point that marks the completion of a work stage or phase. A milestone can be marked by a high level event such as completion (for example the final report presentation), an endorsement or signing off on a deliverable (for example the approval of copy), a document (a monthly status report for example) or a high level review meeting (monitoring and evaluation for example). Typically a milestone is associated with some sort of decision that outlines the future of a project.

A milestone is a scheduling event that signifies the completion of a major deliverable or a set of related deliverables; it is a flag in the work plan to signify that work has been completed. Usually a milestone is used as a project checkpoint to validate how the project is progressing and revalidate work. The milestone approach

is setting targets that we can see; markers that we can aim for and once achieved, we can say: “WE ARE HERE! WE HAVE DONE WHAT WE SET OUT TO DO, WHAT NEXT!” It is important that milestones are set in a project plan to show the attainment of a meaningful amount of work or the completion of a tangible product.

7.2 DELIVERABLE

A deliverable is any tangible outcome that is produced by the project. These can be documents, plans, schedules etc. Internal deliverables are produced as a consequence of executing the project, and are usually only needed by the project team. External deliverables are those that are created for clients and stakeholders.

7.3 VIABILITY

Viability has to do with the need for the project to be initiated. To find out if a project would be viable, go to your target market and do research. Find out if there is a need for the project and if your target market would be prepared to emotionally buy in to the proposed project.

7.4 FEASIBILITY

Feasibility has to do with the practical side of the “execute-ability” of the project. It must be determined if the capacity, resources and infrastructure exists to get the proposed project practically off the ground. To test the feasibility of a project, ask the following questions:

- Is the objective achievable within the budget and the time constraints?
- How are we going to control the work?
- What will be delivered?
- What priorities do we have, what can we negotiate?
- How will we keep the customer happy?

7.5 ACCOUNTABILITY

Accountability is what you can count on a person doing. That person and only that person can be called to account if something they have assumed accountability for, is not done.

7.6 RESPONSIBILITY

Responsibility is what a person feels responsible for; it is a duty towards the tasks they agree to perform. Responsibility assumes a commitment, beyond a person’s accountabilities; they need to act in such a way that they feel obligated to delivering on their tasks, correcting mistakes and finding solutions. Responsibility means the onus is on your shoulders!

7.7 STAKEHOLDER

A stakeholder is an individual or group with an interest in the success of a project, in delivering intended results and maintaining the viability of the project. Stakeholders influence programs, products and services. Normally stakeholders are from within the organisation, such as internal clients, management, employees, administrators, etc. A project may also have external stakeholders; suppliers, investors, community groups and government organisations for example.

Direct stakeholders are involved in the project by providing input, receiving output, providing expertise and even doing project work. Indirect stakeholders can influence a project’s performance or outcome or even stop the project. When you determine your stakeholders, ask the following questions:

- Who are our stakeholders?
- Who provides input?
- Who receives input?
- Who makes decisions?

- What roles and responsibilities will they have on the project?
- What will they give the project?
- What will the project give them?
- How and when will communication take place?



CASE STUDY ON SPONSOR BENEFITS BY JIGGS THORNE, DIRECTOR BUSHFIRE FESTIVAL, SWAZILAND

Bushfire offers extensive benefits to sponsors (key external stakeholders in the Festival), from regional marketing and media coverage through to branding exposure at the event and associated advertising. The Festival works with a top PR company in South Africa to ensure maximum coverage through regional launches and an extensive campaign throughout Swaziland, South Africa, Mozambique and internationally. According to the level of investment a sponsor / financial stakeholder will receive some or all of the following benefits:

- Exclusive Corporate Hospitality Area
- 100 VIP tickets
- Regional Launch Exposure
- Free Website Banner
- Billboard Exposure
- Vinyl Banner
- Newspaper Advertising
- Radio Ads
- Logo on Posters
- Logo on Tickets
- Festival branding / Entrance branding
- Advertising on Emailers
- Logo on Festival programme
- Logo on Drinks Coupons
- Repeated MC Mentions
- Website exposure on Sponsors page
- Big Screen Exposure (10 secs repeated)

7.8 DEPENDENCY

A dependency is an element or an aspect of the project that depends on another aspect to be completed. In other words, without taking the first step (for example booking the artists) an organiser is unable to complete the second step (arranging accommodation and transport for the artists).

7.9 ASSUMPTION

An assumption is an aspect or element of a project that you need to make an educated guess about without having the specific and accurate information at hand. For example theatre productions assume expected audience attendance; this projection or assumption will inform the budget income.

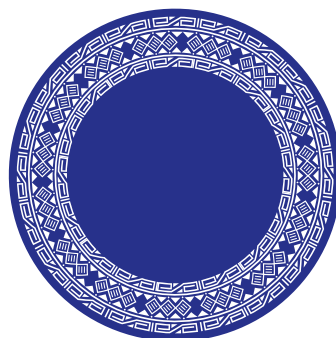
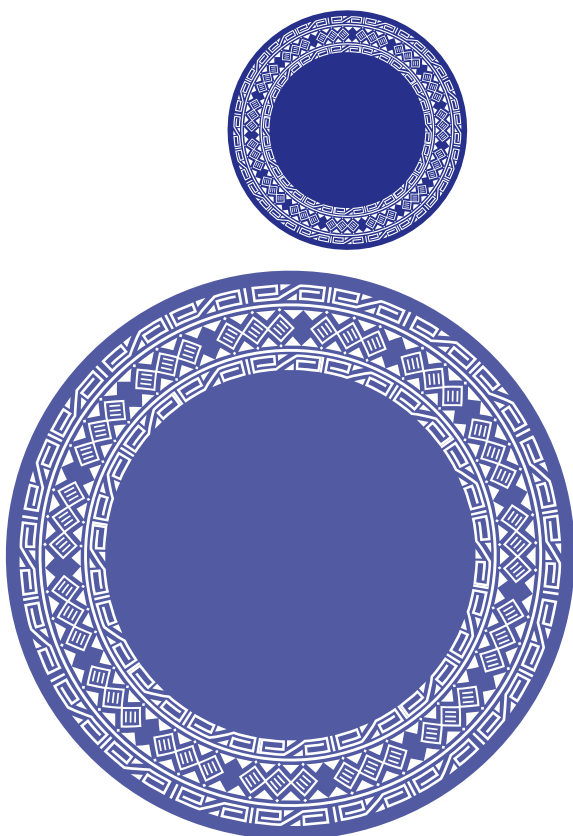
7.10 CONSTRAINTS

A constraint is an element of a project that can slow down or bring the project to a complete standstill.



CASE STUDY ON THE KUONA TRUST'S WASANII WORKSHOP PROJECT IN NAIROBI (KENYA) BY PATRICIA KYUNGU

The Kuona Trust, a visual arts organisation, launched the first Wasanii Artists Workshop in 1997; taking place over two weeks this Workshop brings together 12 artists from around the world, as well as an equal number of local artists. This idea was developed between Kuona and Gasworks in London, one of the founders of the Triangle Network which had been expanding very quickly in the US and Europe and only in the southern part of Africa. East Africa was ready for Wasanii; the viability of the Workshop was tested on a group of artists from East Africa who participated in various Triangle Workshops. HIVOS and the Ford Foundation agreed to fund the Wasanii Artists Workshop, but getting the funds did not guarantee the successful running of the Workshop; a lack of capacity and inexperienced staff proved to be the first practical constraint. The Gasworks generously funded the participation of a project manager who had successfully run several Triangle workshops around the world. This person took responsibility for driving the project forward and empowering and training the team. Stakeholders included the two major funders, the artists who would take part in the Workshop, as well as the visitors who would be invited to the open day as well the exhibition of works created. Kuona Trust has just completed its 10th successful Wasanii International Artists Workshop in Mombasa Kenya; each Workshop renders its own challenges, some different from the previous Workshop, but each Workshop is always a worthwhile learning curve.



SECTION 4

The value of good project management is in the processes and planning, as well as effective leadership and a good project team.

8. THE VALUE OF PROJECT MANAGEMENT

Good project management discipline is the way to overcome shortcomings. Having good project management skills does not mean you have no problems. It does not mean that risks go away. It does not mean that there are no surprises. The value of good project management is that you have standard processes in place to deal with all contingencies. This Toolkit provides templates and tools that you can use across all arts and culture projects.

Project management processes and techniques are used to coordinate resources to achieve predictable results. However, project management is not an exact science and there is never a guarantee of success. Since projects involve people, there is always complexity and uncertainty that cannot be absolutely controlled.

Project management is both science and art. It is science in that it relies on proven and repeatable processes and techniques to achieve project success. It is an art because it also involves managing and relating to people, and often requires the project manager to apply intuitive skills in situations that are totally unique for each project. A good project management methodology provides the framework, processes, guidelines and techniques to manage the people and the workload. A good methodology increases the odds of being successful and therefore provides value to the organisation, the project and the project manager.

It takes time and effort to proactively manage a project. This cost is more than made up for over the life of the project by:

- **Completing projects more quickly and cheaply.** One of the biggest benefits of using a common methodology is the value of reuse. Once the processes, procedures and templates are created, they can be used (perhaps with small modifications) on all projects in the future. This results in reduced project start-up time, a shorter learning curve for project team members and time savings from not having to reinvent processes and templates from scratch on each project.
- **Saving effort and cost with proactive scope management.** Many projects have difficulty managing the scope, this will result in additional effort and cost to the project. Having better project management processes will result in scoping more effectively.
- **Better solution “fit” the first time through better planning.** Many projects experience problems because there is a gap between what the client (sponsor for example) expects and what the project team delivers. Using a methodology results in better project planning, which gives the team and the sponsor an opportunity to make sure they are in agreement on the major deliverables produced by the project.

- **Resolving problems more quickly.** Some teams spend too much time and energy dealing with problems because they do not know how to resolve the problems to begin with. Following processes that are designed to manage issues proactively will ensure that problems are resolved as quickly as possible.
- **Resolving future risk before the problems occur.** Sound risk management processes will result in potential problems being identified and managed before the problems actually occur.
- **Communicating and managing expectations with clients, team members and stakeholders more effectively.** Many problems on a project can be avoided with proactive and multifaceted communication. In addition, much of the conflict that does arise on a project is not the result of a specific problem, but because of surprises.
- **Building a higher quality product the first time.** Quality management processes help the team understand and respond to the needs of the client or the stakeholders in terms of quality. Once the needs are defined, the team can implement quality control and quality assurance techniques to meet expectations.
- **Improved financial management.** This is the result of better project definition, better estimating, more formal budgeting and better tracking of the project's actual costs against the budget. Rigorous scrutiny and management, results in better financial predictability and control.
- **Stopping “bad” projects more quickly.** “Bad” projects are those where the cost-benefit justification no longer makes sense. A project may have started with sound cost-benefit justification. However, if the project is late and over-budget it may hit a threshold where it is no longer financially viable. Effective project management allows you to see these situations earlier so that you can make better decisions to re-scope or cancel the project.



TIP: THOUGHTS ON COMMUNICATIONS

Every six months we publish a newsletter to report on the progress of our activities. A dedicated project website ensures more regular updates and a printed project brochure is available to be distributed by our partners. Of great importance is that we always involve media people (print, radio, TV and online) in our seminars; they keep the news alive for the public.

Sinda Ouertani: Assistant Project Manager for the Centre for Arab Women Training and Research, Tunisia

- **More focus on metrics and fact-based decision making.** Metrics are indicators that give you information about how effectively and efficiently your team is performing and the quality of the deliverables; providing information necessary to validate success. A project will run smoother when there is more focus on quantifiable measurements and solid facts, for example logging the number of invitations distributed as opposed to an estimate. Metrics can be used as a measure against which the next project is developed and compared.
- **Improved work environment.** If your projects are more successful, you will find additional intangible benefits associated with your project team; they will take more ownership of the project, morale will be better; the project team will behave with a greater sense of professionalism and self-confidence. People that work on projects with problems tend to be unhappy; people on successful projects tend to feel better about their jobs and themselves⁶.



TIP: CHOOSING YOUR PROJECT

When you have a couple of project ideas on the table and you have to decide on which one to choose, ask the following questions:

- What benefits can be achieved from each proposal or idea?
- What is our capacity to manage the ideas as projects?
- Does the project proposal or idea match the vision, mission and strategy of our organisation?
- Is there a need for this idea? What are the needs of our customers / participants / audience / community?
- Do we have the resources or will we be able to access them?

9. WHY DOESN'T EVERYONE PRACTICE EFFECTIVE PROJECT MANAGEMENT?

After reading section eight you might wonder why everyone does not utilise good project management techniques. Or you might ask yourself – “why aren’t I using them?” There are usually a couple reasons.

- **It requires an upfront investment of time and effort.** Many people consider themselves to be ‘doers’ but they might not be as comfortable with their planning skills. Many times there is a tendency to discuss a problem, and then go out and fix it. This works when you have a five-hour change request. It doesn’t work on a 5,000-hour project. Resist the urge to jump right in. The project will be completed sooner if you first plan it properly and then have the discipline to manage the project effectively.
- **Your organisation is not committed.** It’s hard to be a good project manager in an organisation that doesn’t value project management skills. For instance, if you take the time to create a Project Initiation Document (also known as a Project Charter) and your manager or director asks why you were wasting your time doing it, you will probably become de-motivated and may even lose interest in the crucial planning process on your next project. To be most effective, the entire organisation must support a common project management process.
- **You don’t have the right skills.** You may find that the lack of project management processes is not a matter of will, but a matter of skill. Sometimes people are asked to manage projects without the training or the experience necessary. In those cases, they struggle without the right tools or training to manage projects effectively.
- **Senior managers think that project management is a tool.** When you discuss project management with some managers, they initially think you are trying to implement a tool that allows you to be a better project manager. Actually, if it were a tool, you might have more luck convincing them of the value. Even though some aspects of project management, like the creation and management of the schedule, may utilise a tool, that is not where the value of project management is. The value is in the disciplined utilisation of sound, consistent processes.
- **You may have been burned (or buried) in the past.** When you start talking about processes, best practices and templates, some managers immediately start to think about overheads, delays and paperwork. They fail to immediately connect with the value that a methodology brings. A common criticism of methodology is that it is cumbersome, paper intensive

and takes too much focus away from the work at hand. Sometimes this criticism is a legitimate concern, caused by not scaling the methodology appropriately to the size of your project. For instance, if you were required to develop a fifteen page Project Initiation Document (or Project Charter) and your project is only going to take 250 hours to plan and execute, you may wish to avoid project management methodology. However, this is not a methodology problem as much as it is a misapplication of the methodology.

- **There is a fear of control from team members.** Many people like to be able to do their jobs creatively and with a minimum of supervision. They fear that formal project management techniques will result in tight controls that will take the creativity and fun out of the work. To a certain extent they are right. However, common processes and procedures eliminate some of

the creativity in areas where you probably don't want it in the first place. You don't need to be creative when dealing with scope change, for instance. You just need to follow the standard processes that are already in place.

- **There is a fear of the loss of control from management.** If you really want to effectively implement a project management discipline at your organisation, then management must give a level of control and authority to the project manager. Some organisations and middle managers do not want to lose that control. These middle managers may want project managers to only coordinate the projects, with the middle manager making all the decisions and exercising all the control. Formal project management will not be possible in organisations where this fear is prevalent.

10. LEADING AND TEAMING

Professional and dynamic leadership and goal-driven teamwork is one of the foundations of project management and the successful execution of a project. It is very important to make sure that you get the right people on the project team. Their roles and responsibilities must be clearly defined, if not, this will lead to conflict in the team and failure of the project.

The people in the project team must:

- have a positive approach to life and to the dream they are sharing
- be committed to do a professional job
- be flexible
- be prepared to work hard and make sacrifices, and
- share knowledge, networks and information.



TIP: PHASES IN TEAMING

Teaming is the process of putting the team together. There are five phases in teaming that a project manager or team leader must keep in mind. These phases will help to understand and manage the people:

- **Forming** – Who is part and who not? There is little trust at this stage.
- **Storming** – Who has power and who not? What is everyone's influence?
- **Norming** – Building of trust and affinity (relationships).
- **Performing** – No big issues in the team.
- **Deforming** – Tension is gone, team experience team spirit⁵.

10.1 LEADERSHIP STYLES

Leadership styles are very important for the effective functioning of a project team. Different situations, people and projects call for a different approach by the leader; no one style of leadership is superior. In the project management environment there are five basic leadership styles:

Autocratic

- Leader makes all the decisions and takes responsibility; gives direction.
- Team members are instructed to carry out directives.
- Thinking is not often or not immediately rewarded.
- Team members are disciplined and corrected immediately after or at the time the mistake occurs.

Controlling

- Leader makes the majority of decisions.
- Team members are tightly controlled and managed.
- Following orders without question is expected and ok.
- Mistakes will be penalised and team members disciplined.

Coaching

- Leader delegates some decisions and responsibilities based on abilities.
- Tight control is applied only to new assignments or crisis situations.
- Thinking and initiative are encouraged and reinforced.
- Failure only rarely results in discipline.

Participatory

- Manager shares responsibility for decision making.
- Minimum controls are applied by the manager.
- Mistakes result in another opportunity to try again.

Empowering

- Teams are self-directed.
- Team members accept responsibility fully.
- The team share successes, mistakes and failures.
- The team is empowered to act and leadership is shared in the group⁵.

10.2 QUALITIES OF LEADERSHIP

To be a project manager or team leader of an arts and culture project you have to have a good combination of the following leadership qualities:

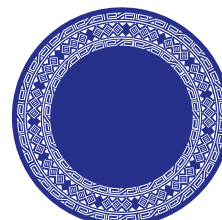
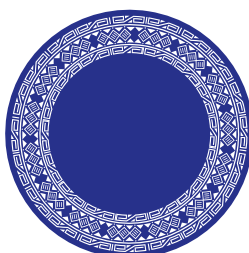
- Passion for the creative and cultural sector
- Strength, determination; a hard-working approach
- Commercial awareness
- Good judgement and ambition; a motivator
- Objectivity, integrity
- Decisiveness
- Dependability
- Foresight
- Emotional stability
- Energetic
- Human relation skills
- Fairness
- Dedication.



TIP: THOUGHTS ON LEADERSHIP

First you need to be clear about the aim of the project; know your project well. As project leader, you are the one to communicate this to your team, ensuring that from the very beginning you are all pulling in one direction. A project leader breaks down the project into actionable components and allocates resources and the right people to implement the actions and achieve the deliverables. It's good to discuss and do this with the team. On implementation, stay accessible to the team, checking in and encouraging, but also pitching in as needed. At the conclusion of a project, a good leader will do a review with the team; applaud successes and also, together with the team, identify what may have gone wrong and how to do better next time.

*Joy Mboya,
CEO, GoDown Arts Centre, Nairobi, Kenya*





TIP: THOUGHTS ON A GOOD TEAM

Keep your project team lean and mean; a big team creates more challenges than they can solve.

Be careful not to hand out too many “manager” titles to your team members. You might sit with too many chiefs and too few Indians and the work will not get done.

10.3 LOCUS OF CONTROL

“A locus of control orientation is a belief about whether the outcomes of our actions are contingent on what we do (internal control orientation) or on events outside our personal control (external control orientation)” (Zimbardo, 1985, p. 275)

It is important for a project manager and project team members to have a strong internal locus of control; taking responsibility for their tasks and making things happen will have a great influence on team motivation, expectations, self-esteem, risk-taking behaviour and the outcomes of actions. Project teams should be encouraged to “own their project”; this is what we mean by a strong internal locus of control.



TIP: THOUGHTS ON A GOOD PROJECT MANAGER

A good project manager needs to have vision, focus and clarity. In Africa, having a sense of humour, a lot of patience and a certain amount of faith, definitely helps! A credible leader needs to be flexible when dealing with people, to listen and be open to learning. One also needs to be reliable and commit only to what is realistic and do-able; it is better to say no than to let people down. Good communication is vital; when you are clear and transparent with people, this will result in trusting “win-win” partnerships.

*Yusuf Mahmoud,
Director Sauti za Busara Music Festival, Zanzibar*

10.4 ROLES AND RESPONSIBILITIES

The organisational structure, roles and responsibilities of a project team must be determined and agreed upon during the project initiation process. This formal structuring of the project team forms a vital part of the effective and professional execution of a project.

In all projects there are some basic or generic roles for project team members, and of course each of these generic roles can be adapted to the needs of each project (for example some projects do not need a dedicated quality assurance officer). More than one role can be assumed by one person or if you have the luxury of a big team, each member can assume a single role.

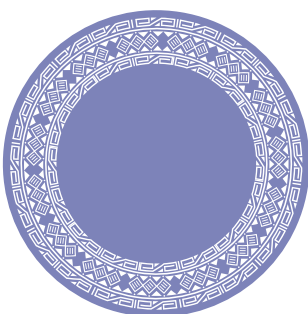
Generic roles for a project team include:

- Project Manager
- Project Administrator
- Project Treasurer or Finance Administrator
- Project Quality Assurance officer
- Project Risk officer

The rest of the project team roles will be determined by the type and size of the project. Project roles can also be determined by the main sections of the work breakdown of a project (refer to the WBS model on page 45). For example there would be a team member responsible for marketing, someone responsible for technical aspects, a person responsible for transport and accommodation etc.

Teams for arts and culture projects can include some or any combination of the following:

- Stage manager
- Technical co-ordinator
- Transport co-ordinator
- Accommodation co-ordinator
- Artist co-ordinator
- Production co-ordinator
- VIP co-ordinator
- Curator
- Communications co-ordinator
- Exhibition manager
- And many others!



SECTION 5

Practical steps and guidelines that are needed to achieve effective project management.

11. HOW DO I MANAGE PROJECTS?

Project Management is all about management of processes. These processes must be clearly defined and well implemented.

There are five main processes in the lifespan of every project:

1. Initiating

("think-tank-thinking-it-through-process")

- Gather all relevant information
- Determine precisely what the project is about

2. Planning ("creating-the-to-do-list-and-delegating-process")

- Plan all actions to be taken

3. Execution

("doing-all-the-to-do-things-process")

- Bring planning into action

4. Control

("checking-up-and-measuring-up-process")

- Measure action against planning

5. Close out

("wrapping-up-and-packing-away-process")

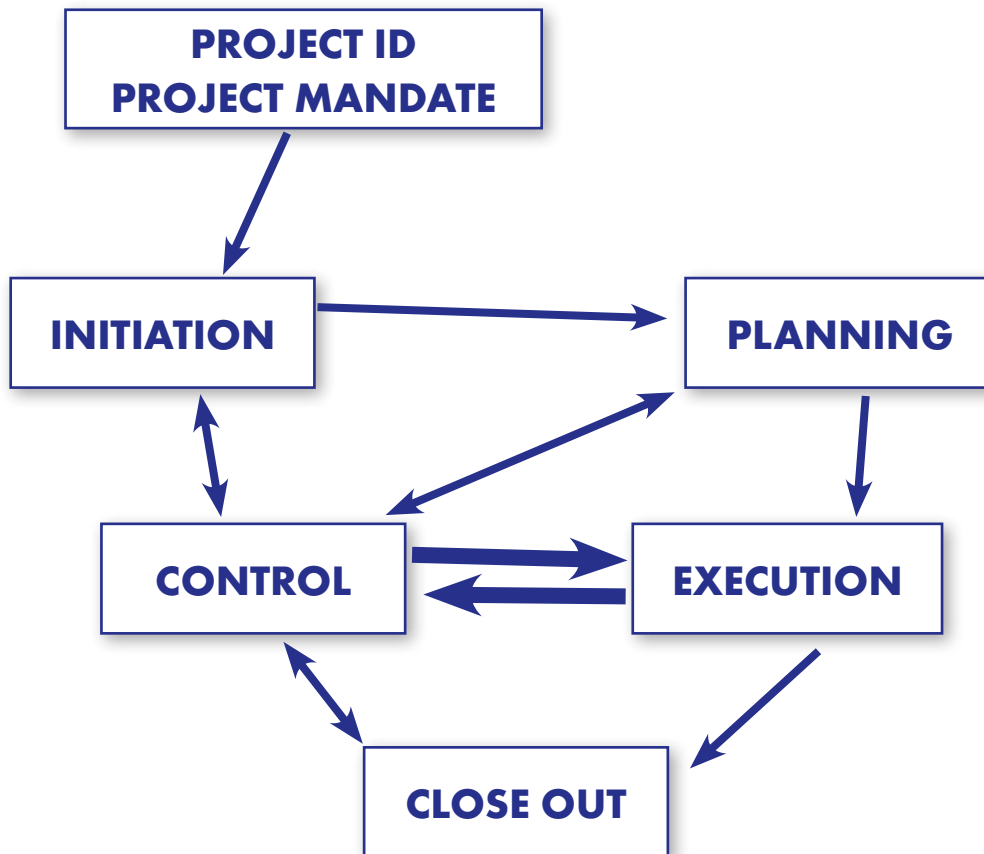
- Finalise
- Report

These processes do not always run individually and will overlap in many instances, depending on the size and type of the project. You might still be initiating certain aspects of the project while other aspects are being planned and other aspects are even being executed. The Sauti za Busara Festival work plan below is a good example.

Sauti za Busara Festival Workplan

Sauti za Busara April 2011 - March 2012	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Evaluation and Narrative Reports, SzB11												
Staff appraisals, crew certificates												
Negotiate Principal Sponsorship, SzB 2012 - 14												
Financial Reports, SzB11												
Design and print postcards, SzB12												
Design and print posters (1), SzB12												
Call for Artists, SzB12												
Planning and Budgeting, SzB12												
Fundraising sponsors, SzB12												
Financial Audits, FY2011-12												
Newsletter - Final Call for Artists												
Fundraising donors, SzB12												
recruit Press Officer												
Staff Training And Development												
Auditions for Zanzibar traditional music groups												
Selection of artists, SzB12												
Festival Venue Assessment												
Negotiate contracts with shortlisted artists, SzB12												
Open meeting with government & business leaders												
Design and print 'line up' posters, SzB12												
Contracts for rental of venues & equipment, SzB12												
Planning and Budget Review, SzB12												
Newsletter - Announcing Line Up												
Workshop - artistic, management or technical (tbc)												
Recruitment of festival crew, SzB12												
Preparations for film screenings and projections												
Flights, Visas & Accommodation logistics, SzB12												
Newsletter - Final Countdown												
Design & Printing - festival timetables, programmes												
Event licenses, artists' visa and work permits												
Street promotion, radio advertising, media campaigns												
Plan for 2012 Festival Impact Assessment												
Workshop technical (2)												
Workshop, Swahili Encounters												
Festival Carnival & Street Parade												
Movers & Shakers networking forum												
Sauti za Busara music festival, 8 - 12 February												
Documentation, Evaluation and Donor Reports												

PROJECT PROCESSES



TIP: PROJECT INITIATION QUESTIONS

While busy with the “think-tank-thinking-it-through-process”, be creative and ask yourself and your team the following questions (these will help you to get a better understanding of the project):¹

- Who would have concern about the success of this project?
- What would they say, ask, or input, that you haven't yet?
- What's the worst idea you can imagine, about doing this project?
- What is the best idea? (the opposite to the above question)
- What is the most outrageous thing you can think of, about this project?
- How would people of all ages / or the target ages relate to this project?
- What would make this project particularly unique?
- What is the worst that could happen?
- How could we deal with that?
- What's the best that could happen?
- Are we ready to deal with that?
- How do we feel about this project?

12. “THINK-TANK-THINKING-IT-THROUGH-PROCESS” (Project Initiation)

The Initiating Process is one of the most important processes in project management, because this is where it all begins. It is also the process that normally gets the least attention; this shows clearly in the success of the project.

This process is primarily about gathering all the information needed to plan and execute the project successfully. All the gathered information must be organised into a Project Initiation Document or Project Charter. This information gathering process must include the following actions:

ANALYSE NEEDS

- Functional
 - Venue / People / Organisers
- Technical needs
 - Food / transport / sound / lighting
- Quality needs
 - project meets the expectations

DETERMINE:

- Objectives and goals
- Criticality of the project
- Project type
- Boundaries
- Requirements
- Success criteria

IDENTIFY:

- Constraints
- Risks
- Dependencies
- Assumptions
- Required products & activities
- Required resources
- Roles and responsibilities

PLAN & ESTIMATE

- Duration / Effort / Schedule

The project team needs to agree on all aspects of the above. It is also important that they define the organisational structure and establish administration processes during the initiation process.

PROJECT INITIATION DOCUMENT (ALSO KNOWN AS THE PROJECT CHARTER)

This is the document into which all the relevant information is organised.

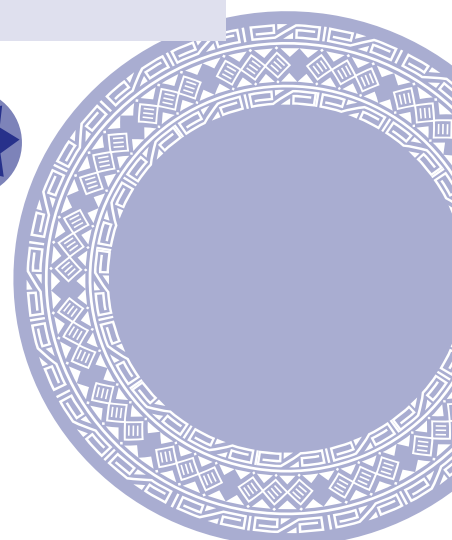
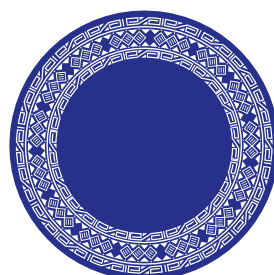
The Project Charter

- Goals & Objectives
- Project details
- Boundaries
- Organisation details
- Control details
- Quality policy
- Expectations of stakeholders
- Assumptions
- Constraints
- Dependencies
- Risks
- Costs
- Benefits
- Time frames



BORROWED WISDOM

The more ridiculous the deadline, the more it costs to try to meet it.





TIP: THE SEVEN ESSENTIALS OF HIGHLY SUCCESSFUL PROJECT INITIATIONS³

Seasoned project managers know that successful projects most often start with successful beginnings. Before actual project implementation, the mix of the project, people, tools, and approaches could either spell success... or disaster. Project Initiation is that critical stage of the project where information about the nature of the project, why the project exists, who is involved, and how the project will be delivered must be laid down. Meri Williams, author of “The Principles of Project Management” (2008) cites seven best practices for a successful project initiation:

1. Choose projects that are important to the organisation and to its future

Ask whether your project takes your organisation in the right direction.

2. Make sure that you have appropriate resources for your project

Ensure that you have the right mix of people, ideas, practices, technologies, sponsors, budget and schedule.

3. Include the people who are affected by, and interested in your project

Stakeholders must be able to voice their opinions about the project and provide succinct ideas about whether or not the project matters. The more the project members are professionally and personally involved in the project, the better it is for everyone.

4. Set up a project board with the necessary members at the beginning of the project

A project board (or a steering committee or advisory panel) must be composed of the people who, on top of knowing the right answers, must also ask the right questions. More importantly, you should appoint people who are not afraid to make difficult decisions.

5. Create a Project Initiation Document (PID) and review it with the project team, board members, and key stakeholders

Although it may be inevitable that certain aspects of your project will change over time, your PID (or Project Charter) must record the project’s very basic information, such as objectives, deliverables, schedules, and initial organisation. These items do not have to be written in detail as a high-level view of the most important facts is all that is needed.

6. Get your project started with a kick-off meeting

You have identified the when, what, where, how, and how much of your project. Now it is time to have a meeting so that you can communicate the answers to all members of the project. It is also at the kick-off meeting where you can make sure that individual members’ objectives for, and knowledge about, the project are aligned with those of the organisation.

7. Create a communications plan that outlines who needs to be kept informed about your project’s progress and how you plan to communicate with those people

Your communication plan should consider who should be included in general and specific communications. Moreover, your plan should identify communication cycles, schedules, and modes of communication e-mails, conference calls, and so on.



TOOL: TEMPLATE OF A PROJECT INITIATION DOCUMENT / PROJECT CHARTER⁵

PREPARATION INFORMATION:

Project Name:	Prepared by:	Signature:	Date Prepared:	Version No:
---------------	--------------	------------	----------------	-------------

PROJECT MANAGER/TEAM LEADER INFORMATION

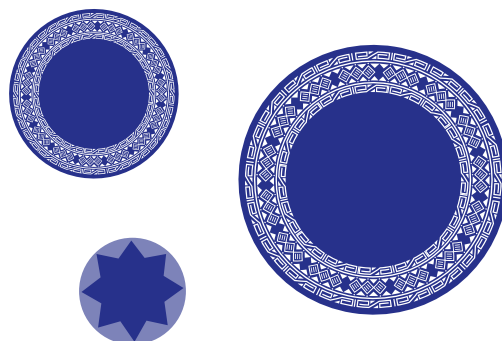
Name of Project Manager:	Telephone numbers: (W) (Cell) (H) (F)	Email:
--------------------------	---	--------

CLIENT INFORMATION

Name of Company/Org:	Telephone numbers: (W) (Cell) (H) (F)	Email:
Contact person:		

1. Background/Summary of Project - What is going to happen? Why is the project happening? Proof of Viability and Feasibility?
2. Project Objectives - what do we want to achieve?
3. Project Boundaries - what is included in the project and what is excluded?
4. Assumptions that have been made:
5. Prerequisites - what must be done or agreed on before this project can start?
6. Constraints - what could slow this project down or stop it?
7. Stakeholders - who are they? Who will play a role in the project?

8. Expectations of the stakeholders?
9. Interrelated projects that will impact on this Project?
10. Control mechanisms - what control will be put in place? For what?
11. Key decisions required and by when?
12. High probability risks identified and action to minimise? (see also risk planning document page 40)
13. Required roles and responsibilities (leading and teaming)
Project manager (Team leader): Stage manager: Finance manager: Technical co-ordinator:
14. Specialists - advisors:
15. Legislation that must be complied with:
16. Budget and expected benefits
17. Estimated time frame of project



12.1 MANAGING PROJECT FINANCES

The importance of sound financial management and control cannot be over accentuated because financial resources in the creative industries are scarce. Good financial management is essential to the success of the project and is linked to planning and estimation of basically everything in the project.

Project managers will very often be called upon to raise additional funds for the project. For more information on fundraising please refer to the “Arts Fundraising Toolkit” published by ARTERial Network (<http://www.artsinafrica.com/publications>).

To follow on pages 32 and 33 are two sample budgets. The first one indicates possible line items which could be used for setting up an organisational budget. This template of possible line items can be adapted to use as a project budget. The second sample shows an extract from an actual theatre production budget.



TIP: STARTING POINTS FOR PROJECT FINANCIAL MANAGEMENT ⁵

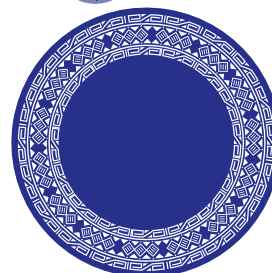
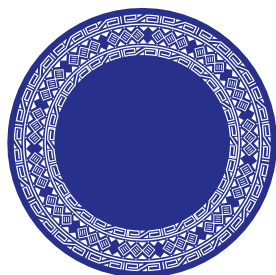
- Get quotations for everything.
- Identify potential costs and when they will occur.
- Identify potential income and when that will occur.
- Define roles and responsibilities.
- Set up necessary documents and financial procedures.



TIP: WORKING WITH THE FINANCIAL MANAGER

Each project manager has to share all their conceptual ideas with the finance person, who will give direction on how to translate projects into financial language. Working hand in hand with a finance person helps to develop project budgets, manage expenses and report for funders. The finance person responsible for any project must ensure the project’s well-being; the more they are involved in the management of finances, the more the finance person will understand and be able to respond to some of the usual creative needs of the project. Also if you are working with an outsourced financial company, the more they understand about the project the less time there will be spent with enquiries – this will save money on accounting fees and financial service fees.

Khadija El Bennaoui of Art Moves Africa, Morocco





TOOL: EXAMPLE OF BUDGET LINE ITEMS FOR AN ORGANISATION OR STRUCTURE

TEMPLATE: POSSIBLE BUDGET LINE ITEMS

			Budget:	Actual:	Variance:	Remarks:
A.		INCOME RELATED				
	1	Donations / Grants / Sponsorships				
	2	In-house/telephone				
	3	Insurance claims				
	4	Performance income / Ticket sales				
	5	Profit on sale of assets				
	6	Rent received				
	7	Sale of products				
	8	Teaching income				
B.		EXPENDITURE RELATED				
1.		Operating expenses				
	1.1	Advertising and marketing				
	1.2	Auditors fees				
	1.3	Bank charges / interest paid				
	1.4	Cleaning/laundry				
	1.5	Computer software				
	1.6	Electricity and water				
	1.7	Fuel and oil				
	1.8	Insurance				
	1.9	Leasing and hiring				
	1.10	Legal fees				
	1.11	Licence fees				
	1.12	Maintenance				
	1.13	Meals and accommodation				
	1.14	Motor repairs and maintenance				
	1.15	Printing costs				
	1.16	Production costs				
	1.17	Rail transport/courier/mail				
	1.18	Rates/Taxes				
	1.19	Security services				
	1.20	Stationary				
	1.21	Subscriptions				
	1.22	Telephone/telex and fax				
	1.23	Training expenses				
	1.24	Travelling expenses				
2.		Personnel /staff				
	2.1	Contract staff				
	2.2	Permanent staff				
	2.3	Temporary staff				
3.		Capital Expenditure				
	3.1	Office equipment				
	3.2	Furniture				
	3.3	Other				



TOOL: EXAMPLE OF TYPICAL BUDGET FOR A PRODUCTION

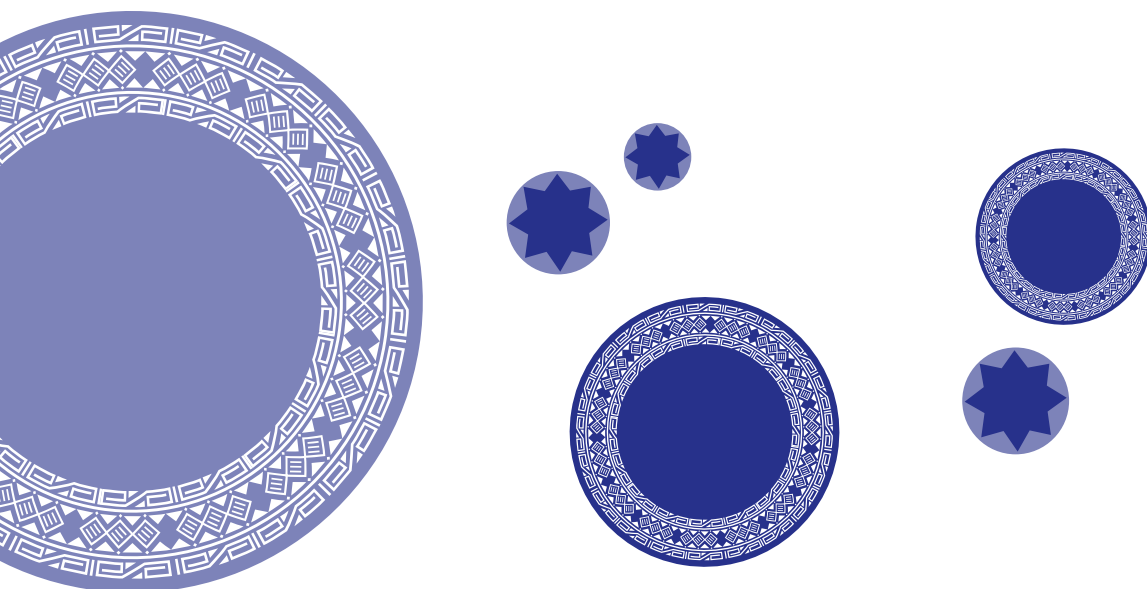
EXTRACT: Back to the 80's Production Budget: North-West University's Sanlam Auditorium

	Sub total	Budget Total	Actual Total	Remaining Total
1. INCOME		357 040.00		
1.1 INVESTMENTS AND LOANS				
1.2 SPONSORSHIP		100,000.00		
1.2.1 Sponsor	100,000.00			
1.3 FRONT OF HOUSE TICKET SALES		257,040.00		
1.3.1 Sanlam Auditorium ticket sales for ** performances at 60% attendance	257,040.00			
1.3.2 Other venues ticket sales for ** performances at 60% attendance	0.00			
1.4 FRONT OF HOUSE COMMODITIES SALES		R0.00		
1.4.1 Sanlam Auditorium souvenir programme sales (** (12,5% of 60% attendance) @ R20.00)	0.00			
1.4.2 Other venues souvenir programme sales (** (12,5% of 60% attendance) @ R20.00)	0.00			
1.4.3 Production Merchandise sales	0.00	0.00	0.00	
1.5 ADVERTISEMENTS AND UNDERWRITING		0.00		
1.5.1 Souvenir programme advertisers to be determined	0.00			
1.6 OTHER		0.00		
1.6.1 Commission repayment by Computicket for Johannesburg Civic Theatre	0.00			
TOTAL ACTUAL INCOME				0.00
2. EXPENDITURE		327,000.00		
Total Expenditure for adjusted gross and profit/loss calculations		327,000.00		
2.1 PRODUCTION PERFORMANCE RIGHTS AND BOX OFFICE ROYALTIES		42,000.00		42,000.00
Pre-production				
2.1.1 Production performance rights deposit to DALRO	1	R35,000.00	R0.00	
2.1.2 Libretti and rehearsal packs hire	2	R4,000.00		
2.1.3 Orchestration hire	3	R0.00		
2.1.4 Libretti and rehearsal packs security deposit	4	R3,000.00		
2.1.5 Orchestration security deposit	5	R0.00		
Sanlam Auditorium				
2.1.6 Sanlam Auditorium box office royalties to DALRO	6	R0.00		
2.1.7 Foyer commodity sales royalties to DALRO (10% of gross sales)	7	R0.00		
2.1.7 Orchestration hire to DALRO	8	R0.00		
2.2 PRODUCTION FINANCIAL AND LEGAL SERVICES		R0.00		
2.2.1 Financial services	12	R0.00		
2.2.2 Legal services	13	R0.00		
2.3 PRODUCTION ADMINISTRATIVE SERVICES		R0.00		R0.00
2.3.1 Telephone	14	R0.00		
2.3.2 Mail and fax	15	R0.00		
2.3.3 Copying and printing	16	R0.00	R0.00	
2.3.4 Internet and email	17	R0.00		
2.3.5 Stationary, paper and filing	18	R0.00	R0.00	
2.4 PRODUCTION MARKETING AND BRANDING - 15% of projected income		R40,000.00		R40,000.00
2.4.1 Marketing material	19	R5,000.00	R0.00	
2.4.2 Media launch	20	R5,000.00		
2.4.3 Advertisement and branding		R20,000.00		
2.4.3.1 Television	21	R0.00		
2.4.3.2 Radio	22	R0.00		
2.4.3.3 Print media	23	R10,000.00		
2.4.3.4 Internet and website	24	R0.00		
2.4.3.5 Other projects	25		R0.00	
2.4.3.5.1 Cape Town billboards and banners R0.00	25.1			
2.4.3.5.2 Johannesburg billboards and banners R0.00	25.2			
2.4.3.5.3 Other creative mediums R0.00	25.3			
2.4.3.6 Publicist Cape Town	25.4	R0.00		
2.4.3.7 Publicist Johannesburg	25.5	R0.00		
2.4.4 Foyer	26	R5,000.00		
2.4.4.1 Foyer exhibition				
2.4.5 Souvenir Program		R0.00		
2.4.5.1 Concept Design, Layout and Print	27	R0.00		
2.4.6 All photography	28	R5,000.00	R0.00	

			Sub total	Budget Total	Actual Total	Remaining Total
2.5	THEATRE AND VENUE HIRE AND COMPUTICKET R0.00 R0.00					
	Pre-production					
2.5.1	Audition venue	29	R0.00			
2.5.2	Cast rehearsal venue	30	R0.00			
2.5.3	Orchestra rehearsal venue	31	R0.00			
2.5.4	Deposit - Sanlam Auditorium	32	R0.00		R0.00	
2.5.5	Deposit - Rehearsal Venues	33	R0.00		R0.00	
	Sanlam Auditorium					
2.5.6	Theatre hire	34	R0.00			
2.5.7	Box office royalties	35	R0.00			
2.5.8	Front of house commodity sales royalties (10% of gross sales)	36	R0.00			
	Box office					
2.5.12	Commission (**% of gross box office income)	40	R0.00			
2.5.13	Credit card commission (2.75% @ 70% of gross income)	41	R0.00			
2.6	PROFESSIONAL SERVICES, SALARIES AND INDIVIDUAL CONTRACTS		R65,000.00			R61,625.00
	Pre-production					
2.6.1	Business Team		R0.00			
2.6.1.1	Marketing manager	44	R0.00		R0.00	
2.6.1.2	Concept and production design manager (Daniel Erasmus)	45	R0.00			
2.6.1.3	Production manager	46	R0.00			
2.6.1.4	Company manager	47	R0.00			
2.6.2	Creative Team		R65,000.00			
2.6.2.1	Director	48	R30,000.00			
2.6.2.2	Musical director	49	R0.00		R0.00	
2.6.2.3	Choreographer	50	R25,000.00			
2.6.2.4	Assistant musical director	51	R0.00			
2.6.2.5	Lighting designer	52	R0.00			
2.6.2.6	Set designer	52	R10,000.00			
2.6.2.7	Sound designer	53	R0.00			
2.6.2.8	Costume designer	54	R0.00			
2.6.2.9	Assistant Director	55	R0.00			
2.6.3	Cast (rehearsals - @ 65% of performance fee per week)		R0.00			
2.6.3.1	Understudy fees (R250.00 per understudy per week)		R0.00		R0.00	R0.00
2.6.4	Crew (rehearsals - 4 week rehearsal period)		R0.00			
	Production per week					
2.6.4.1	Production Stage Manager		R0.00		R0.00	
2.6.4.2	Deputy Stage Manager		R0.00		R0.00	
2.6.4.3	Assistant Stage Manager (2 weeks rehearsals)		R0.00		R0.00	
2.6.4.4	Assistant Stage Manager (2 weeks rehearsals)		R0.00		R0.00	
2.6.4.5	Sound technician		R0.00		R0.00	
2.6.4.6	Assistant sound technician		R0.00		R0.00	
2.6.4.7	Lighting technician		R0.00		R0.00	
2.6.4.8	Gardrobe mistress (2 weeks rehearsal period)		R0.00		R0.00	
2.6.4.9	Follow spot operator		R0.00		R0.00	
2.6.4.10	Follow spot operator		R0.00		R0.00	
2.6.4.11	Additional personnel (move-in, production assistants, move-out)		R0.00		R0.00	
2.6.5	Orchestra (rehearsal - 1 week rehearsal)		R0.00			
	Rehearsal per week					
2.6.5.1	Conductor and Keyboard 1		R0.00		R0.00	
2.6.5.2	Keyboard 2		R0.00		R0.00	
2.6.5.3	Bass		R0.00		R0.00	
2.6.5.4	Guitar		R0.00		R0.00	
2.6.5.5	Drums		R0.00		R0.00	
2.6.5.6	Percussion		R0.00		R0.00	
2.6.5.7	Trumpet		R0.00		R0.00	
2.6.5.8	Trombone		R0.00		R0.00	
2.6.5.9	Reed		R0.00		R0.00	
2.6.6	Audition pianist		R0.00		R3,375.00	
	Sanlam Auditorium					
2.6.7	Cast (performance - 1 week production week and 3 week performance)		R0.00			
	Performance per week					
2.6.7.22	Understudy fees (R250.00 per understudy per week)		R0.00		R0.00	
2.6.7.23	Understudy performances (R200.00 per show and max of R800.00 add		R0.00		R0.00	
2.6.8	Crew (performance 1 week production week and 3 week performance)		R0.00			
	Production per week					
2.6.8.1	Stage manager (Francí Gouws)		R0.00		R0.00	
2.6.8.2	Deputy Stage Manager (Bryan Bartle)		R0.00		R0.00	
2.6.8.3	Assistant Stage Manager		R0.00		R0.00	
2.6.8.4	Assistant Stage Manager (Artéma)		R0.00		R0.00	
2.6.8.5	Sound technician		R0.00		R0.00	
2.6.8.6	Assistant sound technician		R0.00		R0.00	
2.6.8.7	Lighting technician		R0.00		R0.00	

				Sub total	Budget Total	Actual Total	Remaining Total
	2.6.8.8	Garderobe mistress		R0.00		R0.00	
	2.6.8.9	Follow spot operator		R0.00		R0.00	
	2.6.8.10	Follow spot operator		R0.00		R0.00	
	2.6.8.11	Additional personnel (move-in, production assistants, move-out)		R0.00		R0.00	
	2.6.9	Orchestra (performance - 1 week production week and 3 week performance)		R0.00			
		Performance per week					
	2.6.9.1	Conductor and Keyboard 1		R0.00		R0.00	
	2.6.9.2	Keyboard 2		R0.00		R0.00	
	2.6.9.3	Bass		R0.00		R0.00	
	2.6.9.4	Guitar		R0.00		R0.00	
	2.6.9.5	Drums		R0.00		R0.00	
	2.6.9.6	Percussion		R0.00		R0.00	
	2.6.9.7	Trumpet		R0.00		R0.00	
	2.6.9.8	Trombone		R0.00		R0.00	
	2.6.9.9	Reed		R0.00		R0.00	
	2.7	DÉCOR			R60,000.00		
	2.7.1	Décor design and development	56	R0.00			
	2.7.2	Décor construction	57	R60,000.00			
	2.7.3	Décor paint	58	R0.00			
	2.7.4	Décor maintenance and repairs	59	R0.00			
	2.8	WARDROBE			R50,000.00		R50,000.00
	2.8.1	Wardrobe design	60	R0.00			
	2.8.2	Wardrobe production	61	R50,000.00		R0.00	
	2.8.3	Wardrobe styling	62	R0.00			
	2.8.4	Wardrobe maintenance, washing, dry-cleaning and repairs	63	R0.00			
	2.8.5	Shoes	64	R0.00			
	2.9	LIGHTING			R20,000.00		
	2.9.1	Lighting equipment hire	65	R20,000.00			
	2.9.2	Gels and gobos	66	R0.00			
	2.10	SOUND			R25,000.00		
	2.10.1	Sound equipment hire	67	R15,000.00			
	2.10.2	Backline hire	68	R0.00			
	2.10.3	Expendables (22 x 9V batteries @ R25.00 x 80 performances)	69	R10,000.00			
	2.11	PROPS			R5,000.00		
	2.11.1	Props and personal props	70	R5,000.00			
	2.12	SPECIAL EFFECTS			R0.00		
	2.12.1	Lighting	71	R0.00			
	2.12.2	Hazers	72	R0.00			
	2.13	TRANSPORT			R0.00		
		Pre-production					
	2.13.1	Pre-production transport for décor, costumes, props and technical	73	R0.00			
		Sanlam Auditorium					
	2.13.2	Rental Vehicles	73	R0.00			
		Transfer					
	2.13.4	Décor transfer	74	R0.00			
	2.14	CATERING, ENTERTAINMENT AND GIFTS			R0.00		R0.00
		Pre-production					
	2.14.1	Catering		R0.00			
	2.14.1.1	Catering during pre-production	75	R0.00		R0.00	
	2.14.1.2	Catering during rehearsals	76	R0.00			
	2.14.2	Entertainment		R0.00			
	2.14.2.1	Company introduction	77	R0.00			
	2.14.2.2	Sponsors and planning meetings	78	R0.00		R0.00	
		Sanlam Auditorium					
	2.14.3	Catering		R0.00			
	2.14.3.1	Catering during production week	79	R0.00			
	2.14.3.2	Catering during production	80	R0.00			
	2.14.4	Entertainment		R0.00			
	2.14.4.1	Opening night party	81	R0.00			
	2.14.4.2	Closing night company party	82	R0.00			
	2.14.5	Gifts		R0.00			
	2.14.5.1	Production sweater, t-shirt or cap for company	83	R0.00			
	2.14.5.2	Opening night flowers and gifts for company	84	R0.00			
	2.14.5.3	Final show souvenir	85	R0.00			
	2.14.5.4	Other	86	R0.00			

			Sub total	Budget Total	Actual Total	Remaining Total
2.15 TRAVEL COSTS, ACCOMMODATION AND SUBSISTENCE AND TRAVEL ALLOWANCES				R20,000.00		R20,000.00
Pre-production						
2.15.1 Business team			R0.00			
2.15.1.1 Production planning and strategy	95		R0.00			
2.15.1.2 Marketing	96		R0.00		R0.00	
2.15.1.3 Administrative	97		R0.00			
2.15.2 Creative team	98		R20,000.00		R0.00	
2.15.3 Cast	99		R0.00			
2.15.4 Production team	100		R0.00			
2.15.5 Orchestra	101		R0.00			
Sanlam Auditorium						
2.15.6 Business team R0.00						
2.15.6.1 Production planning and strategy	102		R0.00			
2.15.6.2 Marketing	103		R0.00			
2.15.6.3 Administrative	104		R0.00			
2.15.7 Creative team			0.00			
2.15.7.1 Accommodation	105		R0.00			
2.15.7.2 Travel cost	106		R0.00			
2.15.7.3 Daily allowance	107		R0.00			
2.15.8 Cast			0.00			
2.15.8.1 Accommodation	108		R0.00			
2.15.8.2 Travel cost	109		R0.00			
2.15.8.3 Daily allowance	110		R0.00			
2.15.9 Production team			0.00			
2.15.9.1 Accommodation	111		R0.00			
2.15.9.2 Travel cost	112		R0.00			
2.15.9.3 Daily allowance	113		R0.00			
2.15.10 Orchestra 0.00			0.00			
2.15.10.1 Accommodation	114		R0.00			
2.15.10.2 Travel cost	115		R0.00			
2.15.10.3 Daily allowance	116		R0.00			
2.16 RETURN ON INVESTMENTS AND LOAN REPAYMENT			R0.00			
2.16.1 Return on investments			R0.00			
2.17 OTHER			R0.00			
2.17.1 Complimentary tickets cost			R0.00			
TOTAL ACTUAL EXPENDITURE					R3,375.00	
TOTAL PROFIT BEFORE PROFIT SHARE				R30,040.00		





TIP: IDEAS FOR SAVING TIME⁵

■ Don't be a perfectionist

Trying to be a perfect person sets you up for defeat. Nobody can be perfect. Set achievable goals.

■ Learn to say no

Politely saying no should become a habit. Saying no frees up time for the most important things.

■ Learn to Prioritise

Prioritising your responsibilities, actions and engagements is very important. Create a "to do list" which places these in order of importance. One method is the ABC list. This list is divided into three sections: A, B, or C. The items placed in the A section need to be done that day. The items in the B section need completion within the week. The C section items are those things that need to be done within the month.

■ Combine several activities

Combine several activities into one time spot. For example while making a cup of coffee go over in your mind the important points you want to put across at the next meeting.

12.2 TIME MANAGEMENT

Scheduling and managing time wisely is important for any person, but especially for those in project management and the creative environment. If you miss important appointments and deadlines you will cause complications in your project, resulting in anxiety, frustration, guilt, and stress.

To begin managing your time you should have a clear idea of how you use your time. You could do a personal time survey which will help you estimate how much time you currently spend in typical activities. An example of a personal time survey is keeping track of how you spend your time for a week. This will help you get a better idea of how much time you need for tasks. It will also help you identify your time wasters.

Time management in the project planning stage is essential. This is usually marked by date deadlines given within the plan i.e. what needs to be done by when. Time management within the execution stage is of equal importance. In television productions for example time is managed to the second; a typical televised event running order will dictate to the production team what action, footage or insert happens at each minute and / or second in the event. An example of such a running order can be seen in this extract below from the CCN Journalist of the Year Awards held in Ghana in 2009.

EXTRACT: CNN Awards Ghana 2009 Running Order

ITEM	NOTES, STAGE & CONTENT	AUDIO	DUR	RUNNING
1	18H30: GUESTS ARRIVE			
2	19H15: GUESTS MOVE INTO VENUE			
3	" APPROX. 19H30: TITLE SEQUENCE			
"		00:01:00	00:03:00	
4	Presenter Welcome link		00:01:00	00:04:00
5	Speech		00:03:00	00:07:00
6	Speech		00:03:00	00:10:00
7	TITLE SEQUENCE		00:01:30	00:01:30
8	Presenters Opening Link		00:01:00	00:02:30
9	Judges insert		00:03:49	00:06:19
10	Sponsor - intro category		00:01:00	00:07:19
11	1st Award - Tourism Award. South African Tourism		00:00:30	00:07:49
12	Insert		00:01:49	00:09:38
13	Winner's acceptance speech		00:01:00	00:10:38
14	Presenters - intro 2nd award - Television Award - Features. IPP Media		00:00:30	00:11:08
15	Insert with nominees, clips from nominated journalist, judges		00:01:47	00:12:55
16	Sponsor's speech & announcement of winner		00:01:30	00:14:25
17	Winner's acceptance speech		00:01:00	00:15:25

12.3 RISK MANAGEMENT

Risk management needs to happen throughout the lifespan of the project, from inception to its completion. The consequences of not managing risk from the project initiation stage could prove more costly further down the line the more one is vested in the project i.e. the more resources-time, money, human capital -committed to the project.



BORROWED WISDOM

“If you can’t afford to mitigate the risk now, be absolutely sure you can afford to resolve the problem later when it happens.”

What is a project risk?

Project risk can be very subjective depending upon who looks at it; different stakeholders will see a different set of consequences associated with each risk. A fairly common definition of risk is:

An uncertain event or condition that, if it occurs, has a positive or negative effect on a project’s objectives.

What is risk management?

Risk management is concerned with future events whose exact outcome is unknown; the process is one of putting a plan in place to deal with these uncertainties in advance. In general, these outcomes can either be favourable or unfavourable to your project. Risk management is the art and science of planning, assessing (identifying and analysing), handling, and monitoring actions to ensure favourable outcomes. For example if there is a probability of a loss of power on a film shoot, a generator will be on location. This will minimise the amount of filming time that is lost in the event of a power failure.

A good risk management process is proactive in nature and is fundamentally different from crisis management (or problem solving) which is reactive. Crisis management is a resource-intensive process that is normally constrained by a restricted set of available options. Continuing with the above example, at short notice it may take several hours to find, pay for, and transport a generator to a film location. Problem-solving usually happens intensely during a short period of time, whilst time to discover problems (risk management) takes place over a longer period of time.



CASE STUDY:

A CASE STUDY ON RISK MANAGEMENT AND ASSESSMENT OF ART WORKS: CENTRE FOR CONTEMPORARY ART, LAGOS (NIGERIA) BY ARTS AND CULTURE CONSULTANT, IJEOMA LOREN UCHE-OKEKE

Managing risk in an art gallery or museum requires multiple approaches. For instance employing the services of a round-the-clock security service, as well as installing an alarm system, are immediate practical solutions to monitoring traffic within and around the premises of the gallery.

When transporting a work of art locally or internationally, it is vital to plan how it is to be moved, involving a full risk assessment. For example the Centre for Contemporary Art (CCA, Lagos) used Fine Arts Logistics, a company that specialises in art handling, to transport the artworks to the 2010 Johannesburg Art Fair. They assumed responsibility for the movement, packing, installation, transportation and documentation of all the works exhibited by CCA, Lagos. From the smallest to the largest piece of art work, each work of art that was shipped from Lagos was packed into secure cases which are specially designed to minimise the effects of movement, handling and changes in the outside environment.

Securing works of art against risks like fire, water, theft, damage and so on is not the easiest of tasks. To ensure that paintings, sculptures and photographs are covered for their value, art galleries, museums and collectors need to insure their art works. This is the most secure method of at least getting monetary compensation for damaged art works.

Prevention is better than cure!

Risk management consists of two elements:

Element 1: Risk Assessment

- **Identify Uncertainties** - explore the entire project plan and look for areas of uncertainty.
- **Analyse Risks** - specify how those areas of uncertainty can impact on the performance of the project, either in duration, cost or meeting requirements.
- **Prioritise Risks** - Establish which risks should be eliminated completely, because of potential extreme impact, which should have regular management attention, and which are sufficiently minor to avoid.

Element 2: Risk control

- **Mitigate Risks** - take whatever actions are possible in advance to reduce the effect of risk. It is better to spend money on mitigation than to include contingency in the plan.
- **Plan for Emergencies** - for all those risks which are deemed to be significant, have an emergency plan in place before it happens.
- **Measure and Control** - Track the effects of the risks identified and manage them to a successful conclusion.

Effective Risk Management



TIP: HOW TO HANDLE EMERGENCIES

NB! This should be in your risk planning right from the beginning:

- Someone (Project Manager / Risk Manager) take charge.
- Gather accurate information (facts not emotions) about the emergency situation as quickly as possible.
- Assess the facts.
- Make clear decisions on recovery action and possible solutions.
- Communicate decisions effectively to applicable role-players.
- Implement / execute decisions fast, securely and effectively.
- Ensure continuous feedback from the applicable role-players on the progress of the situation and on the solutions / recovery action being implemented.
- Assess the situation continuously and decide on more measures to be taken if needed.
- When resolved, debrief all relevant role-players.
- Above all: "STAY CALM AND FOCUSED ON THE SITUATION!"

REMEMBER: THE SAFETY OF YOUR AUDIENCE, ARTISTS AND CLIENTS IS NOT NEGOTIABLE!



TOOL: RISK ASSESSMENT DOCUMENT⁵

NAME OF PROJECT:

Describe Risk	Cause of Risk	%Probability	Effect			Describe the impact	Preventative action	Recovery action	Responsible
			High / medium / low	Cost	Safety				
			Time						

NB. Make sure you adhere to all applicable event related laws and regulations in your specific country or environment

13. “CREATING-THE-TO-DO-LIST-AND-DELEGATING-PROCESS” (Project Planning)

Project Planning is the process of defining, representing and communicating the work that has to be done to execute the project successfully.

Before we can plan we must understand:

- what we have to do
- what are the expectations
- what constraints apply
- who is impacted
- what dependencies exist
- what standards apply
- what budget is available
- what are the timeframes.



BORROWED WISDOM

“If you fail in your planning, you are planning your failure”

An example of early planning is seen in this extract below from a survey report conducted by an event production company. The survey scoped the venue, suppliers, requirements, constraints etc. Surveys in the planning phase will inform the project work plan.

EXTRACT: Notes from Prelim Uganda Survey/Recce for CNN/Multichoice African Journalist Awards 2010

1. Serena Conference Hall

Venue contact person:

General Manager (+ tel number), Food & beverage Manager (+ tel number), Banquets Manager (+ tel number)

Item	Action	Responsible
1.	Drawings of the venue, with dimensions will be delivered by end November	CAP events
2.	Red carpet can be laid on flat level of venue up to stair – exterior - SEE ATTACHED PHOTOS	Serena Hotel
3.	There are approx. 150 flagpoles outside the venue. The hotel can supply many countries flags – do CNN and Multichoice have flags that can be flown? – SEE ATTACHED PHOTOS	Serena Hotel, CNN, Multichoice
4.	There are 2 operational fountains in front of the venue. Silk Events have said that they can light the fountain with a DMX controller which can change the colours – this devise is waterproof- SEE ATTACHED PHOTOS	Serena & Silk Events
5.	There are lights in front of the building that can be turned on and additional lights can be added as required -These are Tungsten lights and will make the building “yellow” in appearance.	Serena Hotel & technical supplier
6.	The venue can take 1500 guests; advised on a maximum number of 500 guests. The raked seating has 784 seats. Because of bringing the stage forward, the suggestion is to lose the 2 outer blocks of seats. SEE ATTACHED PHOTOS AND SCHEMATIC DIAGRAM The front of the stage would begin 12 meters from the first row of seats	
7.	There is access into the ceiling for hanging points, and lights can also be hung from the balcony. The room can take up to 6 tons of equipment in hanging weight	
8.	There are no dressing rooms backstage, but areas can be created backstage for artists. Dressing rooms for presenters can be created either behind the stage or in the corridor area off the stage area - SEE ATTACHED PHOTOS	Technical supplier & Serena hotel
9.	Air conditioning is not normally turned on during set up, but this can be arranged if negotiated in the hiring cost. Technical suppliers say that the room takes 3 hours to cool down, although the hotel personnel say it takes 30 minutes.	
10.	The venue has no technical equipment that could be used for the event	
11.	Access to the room for set elements and equipment is limited in terms of height dimensions. The maximum height of the entrance for these elements is 2.3m high and 3.3m wide. The set would need to be built in the venue so may need the venue from Monday 23 May - SEE ATTACHED PHOTOS	

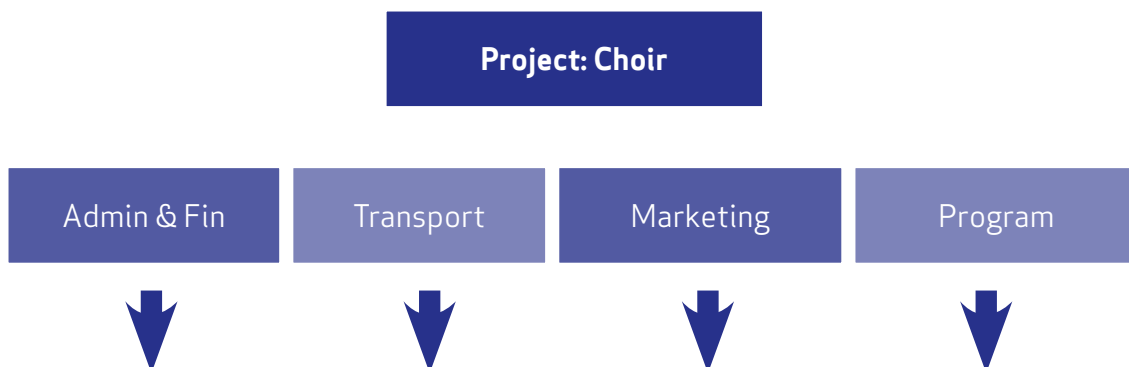
Item	Action	Responsible
12.	Security: The normal hotel security would be available and additional security could be booked through the hotel's supplier.	
13.	President's seating – have been advised that the President will sit away from the other guests – in front of the 1st row of seats and to the right. This is t.b.c. with Government Protocol.	
-	To check that Presidential Protocol will allow use of our podium design - Not Presidential Podium(with Presidential Seal)	
-	President holding room stage left - NO ACCESS TO CREW OR ORGANISERS.	
14.	The National Anthem to be played after he arrives in the venue, but before he sits down, and then again when he leaves	
15.	The venue has a cherry picker – need to establish that it is in good working order	
16.	There is an office supplier in the venue where photocopiers can be used and the sell stationery. Costs will need to be investigated.	
17.	The hotel will not allow outside catering, but will supply crew catering and craft in a separate room just off the foyer. Costs will be negotiated once they receive numbers	
18.	All plug points are square	
19.	A venue maintenance person will be available on site at all times - TO CHECK TO COMPLY WITH OUR WORKING HOURS!	
20.	All equipment trucks, ambulance and OB Van to park in the back car park - SEE ATTACHED PHOTOS	
21.	The hotel engineering team will verify all structures and certification	
22.	All walls of venue are wood panelling	
23.	Fire alarms will need to be turned off in the venue	

HOW DO I PLAN THE WORK THAT HAS TO BE DONE?

Where do I start? How do I plan for what has to be done?
The following points serve as guidelines:⁵

- Break the work up into main sections
- Identify the tasks to be done in each section
- Write tasks down in task lists
- Assign resources to the different tasks
- Determine the duration of each task
- Determine the deadline of each task
- Determine the dependencies of each task
- Sort the tasks into chronological order.

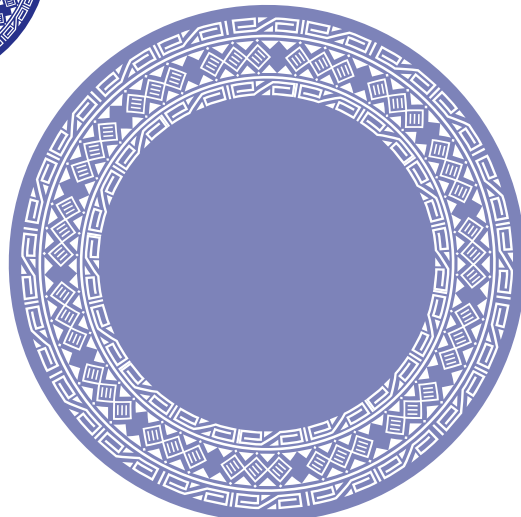
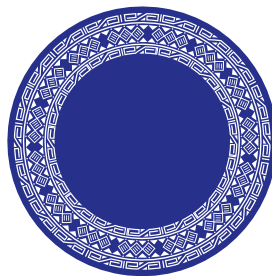
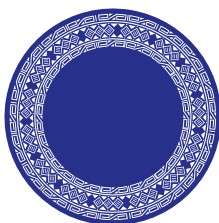
WBS – Work Breakdown Structure for a choir tour (not people breakdown structure)





TOOL: EVENT FACT SHEET⁹

Event:	Name of event											
Date:	Day of the week and date											
Time:	Time of event											
	Arrival time of program participants											
Location:	Venue, building and room number or outdoor location											
Guests:	Guest category list (artists, staff, students, donors, volunteers, community, etc.)											
Purpose:	Goals and objectives of event											
Format:	<ul style="list-style-type: none"> ■ Event: List basic event format (reception, dinner, lecture) ■ Program: Actual start time <ul style="list-style-type: none"> • Introductions and Welcoming Remarks (list program participants) • Keynote speaker • Awardees • Closing Remarks ■ Stage/Program Setup: 											
Budget:	Approved budget, authorised signatory											
Statistics:	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Invitations sent:</td> <td style="width: 50%;">Total number of invitations sent</td> </tr> <tr> <td>Accepted</td> <td>Number of acceptances/rsvps</td> </tr> <tr> <td>Actual</td> <td>Actual number of attendees</td> </tr> <tr> <td>Attrition</td> <td>Difference between acceptances and actual attendees</td> </tr> <tr> <td>Cost per person</td> <td>Final budget divided by number of attendees</td> </tr> </table>		Invitations sent:	Total number of invitations sent	Accepted	Number of acceptances/rsvps	Actual	Actual number of attendees	Attrition	Difference between acceptances and actual attendees	Cost per person	Final budget divided by number of attendees
Invitations sent:	Total number of invitations sent											
Accepted	Number of acceptances/rsvps											
Actual	Actual number of attendees											
Attrition	Difference between acceptances and actual attendees											
Cost per person	Final budget divided by number of attendees											
Contact:	Name of event manager, phone and email											





TOOL: EXAMPLE OF AN EVENT TIMELINE (THIS TEMPLATE CAN BE ADAPTED TO YOUR NEEDS; THIS IS FOR A DINNER FUNCTION) 9

EVENT TIMELINE

Name of Event:

Date of Event:

SIX MONTHS TO A YEAR AHEAD

- Determine the purpose, format, and feasibility of the event
- Create an estimated budget and get approval
- Select the date, check for conflicts with other major functions
- Recruit event team
- Draw up preliminary guest list categories. Collect addresses
- Select the theme if appropriate
- Select and reserve a venue
- Develop a rain plan if the event is to be held outdoors
- Reserve accommodation, if necessary
- Choose a caterer
- Select an event designer (décor, flowers, colour scheme etc.)
- Reserve rental equipment such as vans, buses, tables, chairs, tents, podiums, etc.
- Confirm a master of ceremonies and the program speakers
- Plan audio-visual presentations
- Make preliminary security arrangements
- Check and confirm insurance coverage for your event if applicable
- Get all necessary administrative approvals
- Plan promotion and publicity

THREE TO SIX MONTHS AHEAD

- Write copy, design and get approval of printed invitations and all other printed materials
- Finalise and get approval of the guest list
- Prepare mailing labels if appropriate
- Send save-the-date announcements to guests (3-5 months prior to the event)
- Select menus and submit them for approval
- Make contact with program participants and supply suggestions for their remarks
- Gather their biographical information
- Request a high resolution photo of each participant for publicity and programs
- Keep all relevant role-players informed of your plans, and ask for their support
- Decide on music, book entertainers and talent
- Prepare and get all necessary signatures on performance agreements
- Finalise the audiovisual presentations
- Update security on your plans if dignitaries will be invited.
- Begin publicity
- Hire a photographer and videographer
- Begin creating a logistical outline to document all arrangements as they are decided on and confirmed

TWO MONTHS AHEAD

- Prepare mailing labels for invitation mailing
- Send out invitations 4 - 6 weeks prior to event
- Finalise decor and facility arrangements
- Make hotel and transportation arrangements for out-of-town dignitaries and guests
- Mail an itinerary to dignitaries
- Secure event assistants or volunteers; check the extra help that will be needed

- Make direction and welcome signs
- Write and print the program and menu cards
- Inspect the venue and request repairs if necessary
- Continue publicity on schedule

TWO TO FOUR WEEKS AHEAD

- Record and acknowledge RSVPs as they are received
- Mail out confirmation tickets, parking permits, if necessary
- Prepare registration or welcome packs
- Double-check publicity progress. Revise and update plans if necessary.
- Send detailed instructions to all program participants with tickets, parking permits, maps etc.
- Finalise details with all service providers
- Write speeches and introductions, and get them approved
- Enlarge a diagram of the room to be used as seating chart
- Create a production schedule outlining all deliveries, cues, and timing for the event

ONE WEEK AHEAD

- Ascertain the intentions of anyone who has not sent an RSVP
- Print out the guest list in alphabetical order
- Finish place cards, table cards, and/or name tags
- Create the seating chart and table numbers
- Brief the greeters and volunteers on their duties
- Plan an arrival briefing for VIPs if necessary
- Prepare the briefing packet and send along with the guest list (with full names, titles, business and professional affiliations, and other specific interests), biographies, and the final schedule of events to the administrative leadership or official host
- Call security and double-check all arrangements. Provide them with final itineraries and VIP information.
- Deliver prepared introductions, citations, and speeches to those who will read them
- Make catering guarantees (final numbers, no-shows etc.)

THE EVENT DAY

- Arrive early
- Bring the logistical outline, production schedule, instructions, directions, phone numbers, banquet orders, seating charts, name tags, table assignments, guest lists
- Check all facilities and grounds
- Set up event venue with place cards, signs, gifts, awards, etc.
- Conduct sound and equipment checks
- Set up registration. Be sure it is ready no later than 30 minutes prior to the start of your event
- Follow your production schedule

AFTER THE EVENT

- Send thank you notes to staff, volunteers and service providers
- Finalise billing and prepare final budget reconciliation
- Conduct event debriefing to determine success or ways to improve in the future
- Survey attendees, if appropriate.



TOOL: EXAMPLE OF AN EVENT TIMELINE FOR AN EXHIBITION

EVENT TIMELINE

Name of Event:

Date of Event:

SIX MONTHS TO A YEAR AHEAD

- Define exhibition/ curatorial approach - this may be conceptual in the case of a curator, or if a solo show, more about objectives
- Create an estimated budget and get approval
- Contract artist/s
- Organise monthly critical assessment meetings to track progress
- Select the date, but before confirming it, clear the date with important participants and double - check for conflicts with other major functions
- Recruit event team
- Draw up preliminary guest list categories. Begin collecting addresses for save-the-date mailing
- Select the theme
- Select and reserve exhibition space
- Develop an appropriate rain plan if the event is to be held outdoors -for example if the opening function and speeches are outdoors. An outdoor exhibition including stone sculptures will be rain-friendly
- Choose a caterer
- Reserve rental equipment: sound systems, screens, lights, tables, chairs, tents, etc.
- Confirm a master of ceremonies and the program speakers
- Make preliminary security arrangements
- Check and confirm insurance coverage for your event if applicable
- Get all necessary administrative approvals
- Plan promotion and publicity

THREE TO SIX MONTHS AHEAD

- Finalize image selection and sizes/paper etc, to include in specific selection of media images. This could be done by the curatorial people/person and should include the artist.
- Develop exhibition text (perhaps for vinyl, press release, accompanying pamphlet, publication)
- Visit framers for framing selection and order according to sizes
- Have images scanned/graded
- Print image proofs
- Sign-off on the agreed images
- Finalize and get approval of the guest list for the opening of the exhibition
- Prepare mailing labels
- Select menus for canape's / snacks or light supper; submit them for approval
- Keep all relevant role players informed of your plans, and ask for their support
- Begin publicity
- Begin creating a logistical outline to document all arrangements as they are decided on and confirmed

TWO MONTHS AHEAD

- Send signed work to printers for printing
- Send out invitations 4 - 6 weeks prior to event
- Check that the space is prepared accordingly

- painted if needs be; equipment checked e.g. air conditioning, sound system, IT equipment check that its working properly, establish what software is needed
- Double-check the extra help that will be needed including exhibition tour guides
- Make direction and welcome signs
- Send work to framers at the end of this month
- Design and order vinyl
- Order captions

TWO TO FOUR WEEKS AHEAD

- Vinyl check - spelling - check the "missing dots on the i"
- Installation of images and vinyl
- Lighting rearrangement checked and done accordingly
- Record and acknowledge RSVPs as they are received
- Mail out confirmation tickets, parking permits, if necessary
- Double-check publicity progress. Revise and update plans if necessary.
- Send detailed instructions to all program participants and speakers
- Finalize details with caterer, rental company, and all vendors
- Write speeches and introductions if necessary
- Create a running order (timing schedule) for the opening of the exhibition

ONE WEEK AHEAD

- Prepare the briefing pack (press kit) for the media
- Brief the speakers - especially with the biography of the artist/s and the final running order of the exhibition opening
- Ensure all protocol and security arrangements in place for any dignitaries or VIPs
- Make catering guarantees (i.e. how many people have rsvp'd and what the final catering numbers are)
- Exhibition hanging completed

THE BIG DAY

- Arrive early
- Bring the logistical outline, phone numbers of service providers, running order of the exhibition opening
- Be ready no later than 1 hour prior to the start of the opening event

AFTER THE EVENT (The Exhibition Opening)

- Send thank you notes to staff, volunteers and vendors
- Finalize billing and prepare final budget

AFTER THE EXHIBITION CLOSSES:

- Conduct exhibition debriefing to determine success, shortcomings and ways to improve in the future
- Report writing: with final expenditure. Send to appropriate people



TIP: WHEN PLANNING THE CATERING FOR YOUR EVENT, TAKE NOTE OF THE FOLLOWING:⁹

Catering/menu/contract details

- Have a contact number of the caterer.
- Sign a contract with the caterer in which all detail is clearly described.
- Clarify liquor license accountability where applicable.
- The average no-show rate is 10%.
- Give the caterer a copy of your program and walk through the timing with them.

Menu planning

- Discuss special menu needs (kosher, low fat, vegetarian).
- Provide a variety of foods, and always offer vegetarian/healthy selections. Be mindful of possible allergies and offer options.
- Be mindful of cultural preferences for international guests.
- Offer beverage options when possible (caffeine-free, diet, water, decaffeinated coffee).
- Hors d'oeuvres or finger foods should be eaten in one or two bites.
- Do not trim budgets by reducing the quality of the food or number of serving staff – consider alternatives to expensive items. Catering is always guided by budget.

Alcohol

- If admission fees or money is exchanged at an event, even a tip cup, the personnel pouring the alcohol must have a liquor license.
- Offer both white and red wine.
- Generally allow 2.5 glasses of wine per person. On average, there are 5 glasses in a bottle and 12 bottles in a case.
- Be aware not to serve people who are under age.
- Always serve food when alcohol is served – be careful with selection, salty snack foods encourage dehydration.
- Serving staff should have the authority to not serve inebriated guests and have taxi phone numbers as a back up.
- If you do not have cooling facilities and need to rely on ice consider ice baths. Ice delivery will need to be specifically coordinated according to the time of the event.
- Always ensure one and a half glasses per guest minimum or you run out of clean glasses.

Staffing guidelines

- Need one bartender for every 75 to 100 people.
- Need one server for every 15 people for sit-down meal (if quick service is required, one server for every 10).
- Consider managerial staff to oversee bar tenders and servers. Check staff attire.

OTHER ELEMENTS OF PLANNING

Other elements of the planning process include:

- Procurement
- Contracts
- Cost management

Contracts

This can be a minefield and should be handled with the utmost caution. It is here where obtaining legal advice could be the better option.

A contract is an agreement between two or more people/ organisations which is enforceable and for which the law provides remedy when it is breached. We enter into contracts all the time. Every time we offer tickets for sale or an actor agrees to perform in a specific production, a contract exists. It is however important to understand that for a contract, to be enforceable, it must meet all of the following four conditions:

1. **Competence:** The parties to the contract must be competent to enter into an agreement. Convicted prisoners, the insane, and certain other people are not considered competent. The age of the persons may also be a factor of non-competence.
2. **Mutual agreement:** Both parties must agree on the terms of the contract.
3. **Consideration:** The parties have to do something for each other. This is usually expressed in terms of money, but it can be some kind of service; there has to be some balance.
4. **Lawful purpose:** An agreement to do something illegal is not enforceable.

A contract does not have to be in writing. Verbal contracts, even contracts which are created merely through the action of people, are legally enforceable. It is always better to put an agreement in writing to avoid misunderstanding. Generally, everyday contracts require no legal advice. But it is important that you read all the fine print.

Expensive as legal advice may seem, it can be more cost-effective to hire a lawyer before you sign a contract than it is to hire one after a problem develops.

Here are some typical forms of contracts which are relevant to arts and culture projects::

- **Booking:** Booking is a contract for the purpose of hiring an artist/entertainer or arranging for a performance. Booking agents are usually compensated for their work by receiving a percentage of the contract price.

- **Commissioning:** The process of hiring a person or a team for the purpose of creating a new artistic work is known as commissioning, this involves a contract. The agreement would specify details such as a description of the project, completion date, amount of payment and ownership of the rights in the work, including copyrights and royalties from recording ¹.
- **Service provider:** This is an agreement with a specific provider to deliver specific services to your project like catering, transport, sound etc.
- **Lease:** A lease is a contract between the owner of property/equipment and one who wishes to use it for a specific period. Like any other contract, a lease spells out the rights and responsibilities of both parties during its term. A lease can be for personal property/equipment (office machines, such as computers, photocopiers, etc.), vehicles, or for real property (studios, theatres, buildings, office space). Leases are almost always drawn up by the owner's lawyer for the owner's benefit ¹.

It is best to consult a lawyer before entering in to a lease contract, or at least to read all the terms very carefully. Take nothing for granted, assume nothing that isn't put down in writing and take the time to think carefully about the implications of everything you sign.

Contracts should at least include the following aspects:

- Identify the type of contract.
- Identify the parties involved.
- Determine the purpose of the contract.
- Give definitions and interpretations where applicable.
- Describe the agreement in terms of the services or products to be delivered and the conditions.
- Describe indemnity where applicable.
- Insurance where applicable.
- Patents and copyrights where applicable.
- Suspension and termination clauses.
- Confidentiality where applicable.
- Domicile citandi et executandi (i.e. place of residence / physical address).
- Disputes.
- Space where everybody must sign.

More examples of contracts which could be used in arts and culture projects can be found in The Artist's Handbook (<http://www.artsinafrica.com/publications>).



TOOL: EXAMPLE OF CONTRACT – OUT THE BOX FESTIVAL

AGREEMENT FOR THE OUT THE BOX FESTIVAL FESTIVAL 2011

THIS AGREEMENT is made on the Between UNIMA SOUTH AFRICA (hereinafter called “UNIMA SA”) on the one part And (Individual/Company), hereinafter called “the Artist”) on the other part. Now, therefore, the parties agree as follows:

1. Production Details:

The Artist will present the following performance(s) as part of the Out the Box Festival 2011.

- 1.1 NAME OF COMPANY / PERFORMER :
- 1.2 NAME OF PRODUCTION:
- 1.3 VENUE:
- 1.4 RUNNING TIME:
- 1.5 APPROPRIATE FOR:

2. Remuneration / Expenses:

- 2.1. UNIMA SA undertakes to pay The Artist ...% of the door-takings, as a performance fee from ticket sales.
- 2.2 TICKET PRICES:

Festival	
Full price - Adult	R50
Concessions	R40
Multipass tickets	R40
Children 12 or younger	R40
Block bookings of 10-19	R35
Block bookings of 20-59	R30
Block bookings of 60 or more	R25

- 2.3 SEATING CAPACITY:
- 2.4 A maximum of EITHER 6 tickets OR 1% of venue capacity (whichever is greater) to be used by the media, UNIMA SA management or others, at the discretion of the Out the Box Festival.
- 2.5 Reduced seats for a development program at R25 per seat to be allocated to participants in the development program by agreement with the artist. No more than 30 such seats will be allocated in total to your production. Please indicate if you are willing to allow this, by placing a cross in the relevant box:
Yes No
- 2.6 Other OUT THE BOX artists on complimentary Multipass tickets will be allowed into your show only once all paying audience members have been admitted, and only if there is space remaining in the auditorium.
- 2.7 The Artist will fund all expenses for the rehearsals, construction, artist fees, transportation of set and other internal production costs related to mounting the production.
- 2.8 The Artist is responsible for obtaining licenses for the use of all copyrighted materials and/or any other necessary permissions, to enable the production to be presented at the OUT THE BOX Festival.

3. Rehearsal/ Performance Dates And Times:

UNIMA SA agrees to provide the Artist with the following rehearsal and performance slots.

Description	Day	Date	Times
Rehearsal & Set-up	Sat	3/9	
Performance	Sat	3/9	12h00
	Sun	4/9	21h30
	Mon	5/9	18h00

4. Out of Town Artists:

- 4.1 UNIMA SA will provide all local transportation for the Artist including airport pickup and drop off, unless otherwise arranged.
- 4.2 UNIMA SA will make arrangements for, and pay for accommodations for ... persons for the days indicated in the schedule below:

01/09	02/09	03/09	04/09	05/09	06/09	07/09	08/09	09/09	10/09	11/09
					X	X	X	X	X	X

- 4.3 UNIMA SA will pay per diems (of or equivalent meal vouchers per person per day) for the Artist (inclusive of 4 persons) for 6-11 September (6 days).

5. Technical Support and Obligations:

- 5.1 UNIMA SA supplies the Venue for rehearsal and performances according to the schedule above, as well as all resident venue equipment. UNIMA SA also supplies a general Technical Manager & Venue Manager. The Artist will be allocated one technician to assist with the actual running of the show.
- 5.2 The Artist agrees to provide a technician or stage manager with knowledge of the technical requirements of the show, unless otherwise negotiated.
- 5.3 All set requirements and props are to be supplied by the artist.
- 5.4 Any specific technical requirements that are not standard to the theatre, must be confirmed with the Technical Manager, and will be for The Artist's account should hiring in be required..

6. Marketing and Publicity:

- 6.1 UNIMA SA undertakes to market the performance through the festival's general publicity campaign. However, we encourage all artists to market and publicise their individual shows in addition to this, using their own networks where appropriate.
- 6.2 The Artist agrees that all such individualized publicity (such as the promotion of individual press releases, posters, flyers for their own production) will be supplied and paid for by the Artist.
- 6.3 The Artist's individual posters and applicable print media and advertisements must all carry and display the UNIMA SA and the OUT THE BOX Logo.
- 6.4 UNIMA SA agrees to prohibit media photography and video as well as public photography of any part of the performance, rehearsal or workshop. Video and photography will only be allowed after confirmation directly with UNIMA SA and The Artist, as is requested individually by members of the media.
- 6.5 The Artist agrees to allow UNIMA SA to film and photograph parts of performances for promotion of the festival, the UNIMA SA archives and future publicity for the festival.
- 6.6 The Artist has the right to sell merchandising items related to the performance at prices mutually agreed by both parties, in consultation with OUT THE BOX.

7. Artist comps:

- 7.1 The Artist has discretion to assign complimentary tickets for their own shows to audience members, but they must inform the box office 24 hours in advance or by special arrangement with the organisers. No complimentary tickets will be assigned at the door.
- 7.2 UNIMA SA agrees to provide each Artist with 1 Festival Multipass ticket per company member, allowing free entrance to 4 shows on the festival.

8. Cancellation:

This agreement may be prematurely terminated under the following circumstances:

- i. Either party may terminate this agreement with immediate effect in the event of becoming bankrupt or insolvent;
- ii. Force Majeure: This Agreement may be terminated in the event the Artist is unable to perform or UNIMA SA cancels any or all performances in consequence of any public war or calamity, acts of terrorism, air raids or warning thereof, riots or civil commotion, epidemic, fire, act of God or any other accident, including accident, illness, disability or death of any performer(s), beyond the control of the Artist and Out the Box, as the case may be (each, an event of "force majeure").

9. Liability, Indemnity and Insurance:

- 9.1 The Artist undertakes to use all reasonable skill, care and diligence in the provision of artistic services for their participation in OUT THE BOX.
- 9.2 Except to the extent required by law, UNIMA SA and the OUT THE BOX festival shall have no liability for any loss or injury (including death) or damage whatsoever caused or suffered by the Artist, which arises out of or in connection with the engagement. In addition the Artist hereby undertakes to indemnify UNIMA SA and OUT THE BOX festival in respect of any claims whatever kind made against it, which arise from any wilful misconduct by the Artist or negligent performance of Artist's duties under this engagement.
- 9.3 The Artist agrees to take out and maintain adequate professional indemnity insurance to meet their obligations. The Artist is responsible for arranging and bearing the cost of any other insurance which they consider necessary in connection with this engagement; this includes cover in respect of death, illness, accidental injury on and off duty, disability and healthcare and also travel insurance and cover for personal possessions.

Signed by, for and on behalf of THE ARTIST

Namely, _____

SIGNATURE: _____ DATE: _____

Signed by, for and on behalf of UNIMA SA OUT THE BOX FESTIVAL DIRECTOR,

Namely, _____

SIGNATURE: _____ DATE: _____

14. “DOING-ALL-THE-TO-DO-THINGS-PROCESS” (Project Execution)

The execution of a project is the “bringing-to-life” of all the planning:

- physically putting plans into action
- making the goals and objectives a reality
- creating an end result.

The execution of a project must be:

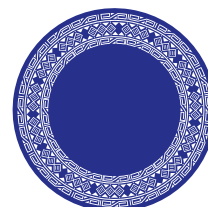
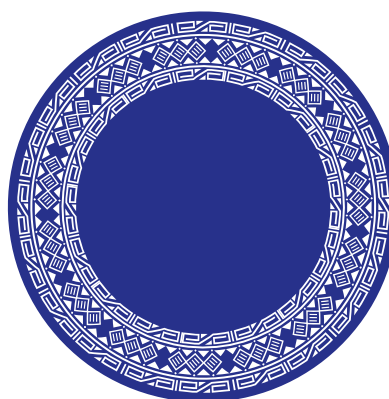
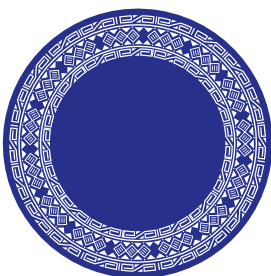
- according to planning
- well managed
- excellently controlled
- properly communicated
- well documented
- flexible and able to adapt to changing circumstances
- on time and punctual.



TOOL: EXAMPLE OF A PROJECT PLAN – EXTRACT FROM OUT THE BOX FESTIVAL PROJECT PLAN

Dates	Artists	Venues / Technical requirements / Vibe and atmosphere	Transport: Flights / Local transport / Cargo	Accommodation	Specific Events – World Day, Opening, Closing, Conference, Active etc.
Week 1: 8-14 Aug	Contracts return date: Friday 10/8; Respond to any artists' concerns relating to contracts. Acquire all missing technical information etc. Acquire high res photos if not already submitted	Book all workshop venues based on completed schedule; Meet with Technical manager for overview of work.	Book busses for schools. Ascertain all booked flight times and travel arrangements to/from festival Liaise with artists re. flight bookings/ cargo arrivals.	Book all accommodation; Pay deposits on accommodation where necessary.	Check on programme of each event. Send these out to all concerned.
Week 2: 15-22 August	Ensure all relevant parties have Artists' contact sheet; Ascertain what additional publicity will be created/ provided by artists.	Check all productions' tech requirements with Technical manager. Convey issues of hires to artists. Electricity and venue requirements for food and stall vendors; Contract Food vendors.	Create Transport template for local pick-ups and drop-offs – artists and set. Hire vehicles as appropriate.		Check copy of invitation and Send out invitations to Opening Night
Week 3: 23-30 August	Complete Information packs for artists (Welcome letter from Festival; 1 Multipass per artist; Festival badge or ID; Festival programme; Festival schedule; tourist info on Cape Town. map of venues; list of contacts, emergency numbers; accommodation info, address and numbers etc, bus tickets etc) to welcome pack.	Assign Venue Managers to each venue. Create list of tasks for venue managers and FOH. Technical Manager to check all venues; set up all schedules. Meeting with Venue managers to go through schedule and answer questions, give them list of tasks; Check on phone numbers and create Master Contact sheet for festival. Distribute to all role players. Ascertain lock-up procedures for all venues. Check that all additional requirements are available and in venues. Coordinate storage space and dressing rooms.	Meeting with driver to discuss Drive schedule, to make sure he/ she knows where all accommodation is, and to create systematic approach to airport pick-ups.		Ensure glasses/table hire for Opening, Closing. Microphones and sound requirements, technical requirements for productions Fetch wine for opening; Ensure Labia has all films for Film festival and these have been tested

Dates	Artists	Venues / Technical requirements / Vibe and atmosphere	Transport: Flights / Local transport / Cargo	Accommodation	Specific Events - World Day, Opening, Closing, Conference, Active etc.
Week 4: 31 Aug - 4 Sept PRE- PROD & PROD WEEK	Ensure Meet and Greet set-up for each Artist group; Draw cash for per diems; Set up cash book for per diem payments; Pay Artists' per diems.	Displays: set up publicity material on walls in each venue; Hang banners and other display materials; Posters up and in all venues; Tickets ready; Ensure sponsors are acknowledged visually (if this is part of contract); Check and coordinate outdoor set ups; Food Stalls and vendors - ensure they know where to set up and where to get electricity; Ensure venue lock-up procedure clear.	Create and distribute Festival Call Sheet with all info on scheduling.	Check with accommodation that they have correct arrival and departure dates if changes have occurred. Pay final Accommodation.	Ensure that all venues for workshops/ talks / conference are set up. Oversee setting up of exhibition
Week 5: 5-11 September PROD WEEK	Ensure Meet and Greet set-up for each Artist group. Pay Artists' per diems.	Sunday 28: Strike all venues; Ensure that all Artists' have removed sets, costumes etc; Ensure that freighting out has been organised. Remove all publicity material for the archives.	Ensure that any daily changes are conveyed to Driver/s. 28/03: Ensure vehicles returned after last drop off.		Ensure that all venues for workshops/ talks / conference are set up. Open/lock venues and check equipment. Oversee setting up of exhibition.
Week 6: 12 - 18 September	Send statements and receive invoices from artists. Ensure Artists fees paid.	Return all technical and other equipment. Check that all outstanding payments have been done. Check venues that they have been returned to original state. Report back.	Return hire car. Reconciliation of any last accounts/hours etc.	Reconciliation of any last accounts.	Check that all outstanding payments have been done. Check venues that they have been returned to original state. Report back.



BORROWED WISDOM

"Although we are in the 21st century with great technology, a cellphone can never replace the good old "walkie-talkie" (2-way radio) for effective communication between project team members on the day of your final event.

15. “CHECKING-UP-AND-MEASURING-UP-PROCESS” (Project Control)

The control process is the one continuing process throughout the lifespan of the project and is vital to the success of the project.

Controlling is:

- Checking the progress of the work against the planning; making corrections and adjustments.
- A continuous process throughout the lifespan of the project.
- Effective communication and regular report back.
- Critical to the success of the project.

WHERE DO WE LOOK TO KNOW HOW WE ARE DOING?

The monitoring of the progress of the execution of the project plan is critical and depends strongly on effective communication about the tasks being completed and those not yet completed. Verbal or written reports by team members must be properly documented as this helps the project manager to keep track of what has been achieved and what still needs to be done.

The project manager can also monitor the resources used or look at the money spent to determine how they are doing with the project. S/he can also make note of any organisational changes and monitor the motivation and morale of the project team to establish if they are still on course and on time with the project.

16. “WRAPPING-UP-AND-PACKING-AWAY-PROCESS” (Project Close-out)

The close out is the formal closure of the project and includes:

- Completing all administration tasks.
- Returning all borrowed and hired equipment.
- Releasing personnel and resources.
- Finalising accounts and invoices.
- Reviewing and evaluating the project.
- Writing final project report.

REVIEW / EVALUATE THE PROJECT

In the review/evaluation of the project, the following should be addressed:

- Successes
- Actual outcomes
- Mistakes and errors
- Preventative measures
- Time standards for future use
- Review performance against objectives, scope, budget, plans, risks
- Recommendations.

For more information on project monitoring and evaluation you could refer to the “Advocacy and Networking Toolkit”, published by ARTerial Network (<http://www.artsinafrica.com/publications>)

AT THE END OF THE CLOSE OUT, AFTER THE FINAL REPORT IS APPROVED, CELEBRATE AND SAY WELL DONE TO THE TEAM!



TOOL: PROJECT REPORT⁵ (LESSONS-LEARNED DOCUMENT)

PREPARATION INFORMATION:

Project Name:	Prepared by:	Signature:	Date Prepared:	Version No:
---------------	--------------	------------	----------------	-------------

CLIENT INFORMATION

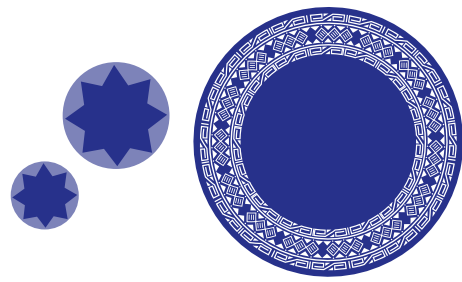
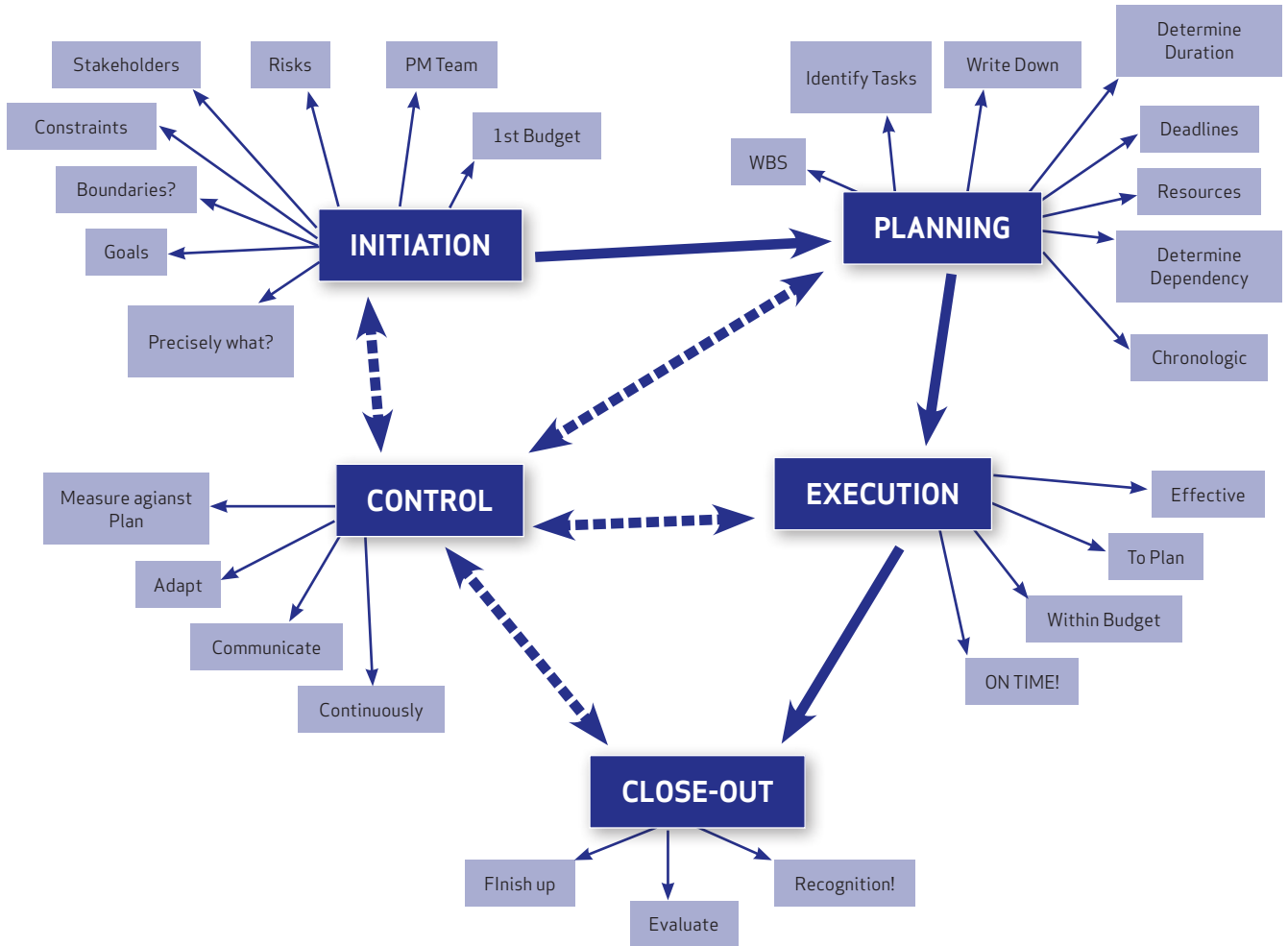
Name of Company/Org:	Telephone numbers: (W) (Cell) (H) (F)	Email:
Contact person:		

Summary
Project Background
Learning highlights
Recommendations summary
Technical Review
Project experience - what happened? / what have we learned?
Recommendations - what can we do to make it work better in future?
Administrative Review
Project experience - what happened? / what have we learned?
Recommendations - what can we do to make it work better in future?
Risk Management Review
Project experience - what happened? / what have we learned?
Recommendations - what can we do to make it work better in future?
Financial Management Review
Project experience - what happened? / what have we learned?
Recommendations - what can we do to make it work better in future?
Client Relationship Management (for example sponsors, audience, participants)
Project experience - what happened? / what have we learned?
Recommendations - what can we do to make it work better in future?
Team Relationship Management
Project experience - what happened? / what have we learned?
Recommendations - what can we do to make it work better in future?

NOTE: Remember to:

- Attach your final approved financial statements.
- Make sure that key stakeholders like sponsors also receive a copy of the final report.
- File a copy for future reference.

Project Management – Summary of Processes



17. Bibliography

- 1) **ALLEN, D.** 2011. *Project planning check list*. www.projectkickstart.com 26 September 2011.
- 2) **DU BOFF, L.** 1996. *The Performing Arts Business Encyclopaedia*. New York : Allworth Press.
- 3) **PROJECTSMART.** 2009. *The Seven Essentials of Highly Successful Project Initiations*. www.projectsmart.co.uk , 26 September 2011
- 4) **PM SERVICES.** 2011. *Creed of the obsessive, compulsive project manager* www.pmservicesnw.com , 26 September 2011
- 5) **RIDER, L.J.** 2000. *Practical Project Management Principles*. Johannesburg: Corporate Training Specialists.
- 6) **TENSTEP.** 2010. *The value of project management*. www.tenstep.com , 26 September 2011.
- 7) **TENSTEP.** 2010. *Why doesn't everyone practise effective project management?* www.tenstep.com , 26 September 2011.
- 8) **TURNER, J.R.** 1997. *The Handbook of Project Based Management* (The McGraw-Hill Companies)
- 9) **UCLA.** 2011. *UCLA Special events and protocol*. www.specialevents.ucla.edu , 26 Sept 2011
- 10) **VAUGHAN, H.** 2009. *Effective Project Management: Five Laws that Determine Success*. www.projectsmart.co.uk , 26 September 2011.

