

# Arts Administration Practical Guide for Community Engaged Artists



Written by Sharon Kallis

*There are as many ways to define a creative social engagement practice as there are artists. I think the key for anyone is to use their own strengths, abilities and experiences and build on that. This document aims to provide a bit of grounding in some basic administration methods, organizational tools as well as provide awareness of what is often required for a community engaged project.*

## **Introduction:**

I have been working as a community engaged environmental artist since 2008, before that I split my time between my own studio work, teaching art in various capacities and working part time as an arts administrator for the City of Burnaby. It was through a mentorship with artist Haruko Okano that I began to see how all the pieces of my own puzzle could come together-merging the skills I had developed in arts admin to my own art practice, and bringing my own environmental sensitivities to my creative role as an artist in the community.

My creative mandate is to leave as soft an environmental imprint as possible, while engaging with others through the practice of common work- participatory art installations and shared art related experiences.

Every project is as different as the artist who envisions it, but I am using some of my past projects as templates to give a context to the conversation. I have no formal training in “arts admin” as is now offered as a focused degree program, but have learned on the job through trial and error. The following information comes from my own experience; like the wide variety of approaches to an art practice, there are many ways to approach administrative work efficiently. What is presented here is what works for me, and I hope gives you some assistance in developing your own administrative methods.

### **This document covers three main categories:**

- **Project Development**
- **Project Management**
- **Reporting**

I am breaking down many different bits of information under these sections to help you build a project, source funding, problem solve challenges and forecast issues that may arise in your work within a community engaged context.



## Project Development: planning, funding and implementation



So, you have a great idea and now you need to find the people and financing to make it happen, what next?

- **Find your partners**
- **Beginning your narrative, timeline, and budget**
- **Letters of support**
- **Grant submissions**

### Find your Partners

Most grants are not eligible to individuals, but to organizations, or (as with Canada Council) to artist collectives of 3 or more eligible artists.

***Do research and find a suitable partner organization, a non-profit, charity, neighbourhood house or community centre.***

All of these are great places to begin looking for a partnership organization. Most grants will need to go in through the partner organization, but you most likely will do the grant writing, and will need to write a short synopsis of the project idea for an organization's board to look at and approve. Note that an organization will not be eligible for more funding until final reports are submitted, so your project needs to fit the organization's mandate.



Many funders like to see partnerships between organizations, so having a network of similar-interest parties is great.

**Think about what the key goals of your project are; place it at the centre of a network that you can create.**

**Example:**

An inner city food security and “edible art” project may partner youth training with a specific urban group, and an environmental food growing focused non-profit.

**Think “wide angle” on who would gain valuable experience and connections from being connected with others in a creative project.**

## **How to Begin: draft a short document that includes a brief narrative, timeline and budget**

- **A brief narrative of project; the idea and objective or goal**

Include short biographies of your key role people: artists, community members, and any partner organizations. If you are hoping to have an organization/artist involved but do not yet have confirmation, list their participation as “pending” so their involvement is included, but it is clear to everyone where your project development process currently stands.

- **A timeline**

**This is an important document that you will need for grants, but is also a great organizational tool.**

It allows everyone to see the breadth of the project; is it 2 months or a 1 year? Include in your timeline the other grant deadlines that you will be applying for, a community consultation phase, a research phase, as well as the hard deadlines that apply to your specific project- performances, final celebrations etc.

See *Planning Notes* under the **developing a narrative** section for more information on effective and useful timelines.

### **Build on Existing Infrastructure:**

Whether you are working in a larger geographical community, with a community centre, or other group; look for existing calendars of events.

**Are there annual festivals, celebrations, weekly workshops, community gatherings?**

**What exists in the culture that you can build on and add to?**

**Think how the existing infrastructure can be used as a marketing tool for getting the word out about your project, as well as where opportunities exist to highlight and feature the work that has happened in your project.**

Do some research on activities and dates for events and build these into your timeline. Large regular occurring seasonal events are often produced by small groups that may be interested in being listed as project partners; find and develop contacts with other event organizers in the community, it is worth them knowing what you are up to and finding how your projects can possibly support each other.

- **A budget**

I know very few artists who like budgets, most people hearing the word budget think math- I personally was a math drop-out and love budgets- go figure!

The reason?

I love puzzles, spatial planning and the sense that everything is in its place.

*Think of building a budget as packing a trunk for a trip, or filling a kiln for firing ceramics- there is a finite amount of space, and a certain amount that needs to fit in the space.*

If it helps, think of the numbers just as cubits of space-taking objects, and the total budget amount as how much room you have, then just play with the numbers until all the space is used, knowing that “some bags will require more room than others”, and are less flexible in scale.

**Math is not that necessary, but the auto sum button on excel will be your new best friend.**



**Do note:**

- Most funding bodies will fund 50% to 75% of a project and also have an average or ceiling of what they will fund.
- Funders want to see that there is money being applied for from various sources.
- Some grants are good for funding administration or documentation, while others might cover more community engagement or artist fees. Do your research on what is fundable from whom, and how much they will fund.
- A large project may have several grants with deadlines spread over several months. Make sure your budget lists grant funds to be used for project component happening well after you would have received those funds- not before! It helps to think of project phases or stages- Some money may come in mid stage 1, and be available for stage 2 expenses.
- An example of 3 Stages may be: Research, Production and Presentation

A Simplified Example: (for demonstration purposes only!)

YOUR Project Title here	Canada Council max funding up to 75% of total project	BC Arts Council max funding up to 50% of total project	Municipal Grant max funding up to 50% of total project	In kind
Total Request \$53,000	20,000	15,000	8,000	10,000
Artist fees 25,000	14,000	8,000	3,000	0
Marketing 3000	500	500	1,000	1,000
Administration 10,000	3,000	2,000	2,000	3,000
Documentation 5,000	2,000	2,000	1,000	0
Production Costs 10,000	500	2,500	1,000	6,000

*It is crucial that your budget balances the expenses and revenues*

**Revenue:**

List all grants you plan on applying for and note “pending or confirmed” for their status

**In-kind** can sometimes be used as matching funding or recognized as the “other” percent required-ask.

In-kind may include general volunteer hours, facility rental donation from community partners, professional services from a participant- ask the grant officer, and find out what if any support documentation is required for listing in-kind.

**In-kind is a powerful thing to have on your side.** It shows community support for the project and can also be listed as confirmed on your budget, when everything else may be pending!

*Don't put all of your eggs in one basket!*

*Balance project expenses between a few grants. Chances are high you will not get a full 100% funding from 100% of the grants you apply for, and will be doing some serious re-drafting; this is easier if you have listed each expense line across a few of the grants.*

Many grants have a final report budget form that needs to be filled out.

There may be a specific method of how they want things categorized i.e.; artists fees, administration, marketing etc. **Take a look at the final report form requirements for grants on the funder's website and see how they have things listed; it may be of use to refer to those categories in how you build your budget in the first place.** Assuming you are going to get your grant, you may as well build the budget from the ground up in the way it will finally need to be reported on.

### **Letters of support:**

With many grants letter of support from the community or partnering groups are needed, or at least helpful. Give lots of lead time for this, and offer to draft a point form of what is helpful to have included. Make it easy on your partner community groups, and don't forget to keep them posted when you find out if you have been successful or not.

**These starting points: narrative, timeline and budget are the basics for the next step...**

## Grants



### **Grant Officers**

**I cannot stress enough the importance of having conversations with funding officers, they are your friends!** During the jury process they will be the ones that know about your project and can speak on your behalf to a jury's questions. **There is no point in applying for funding from a grant for which your project does not fit.**

- Write down the key points about your project; **The “who, what, where, how and why”**
- Read everything listed on-line about the grant, then read it again to make sure you didn't miss anything.

**Make a list of your questions and call the grant officer.**

Introduce yourself and your project in a simple concise way and do some fact gathering about what parts of your budget would be eligible versus better listed for another grant AND confirm your general eligibility.

For instance some artists you wish to be working with may not have the experience to be eligible on a Canada Council grant, but could be for a municipal grant. Your budget needs to reflect this.

**Some grants are artist peer reviewed, and as such should use appropriate language**, where other grants may be more social enterprise and the jury will be looking for different things, and more inclined to follow a different language; tailor each grant to the specific audience.

- **When grant writing- highlight the language the funder uses, and know who the audience is.**



The grant information itself will have key words listing the kind of projects and outcomes funders are looking for in the projects they support; take note of this language, and **check back periodically as you write and edit and re-read that funder's document.**

Make sure you are answering all of the questions being posed using the appropriate language.



## Developing a Grant Submission

*I think a grant application that reads well is equal parts selling the idea, highlighting the beauty, originality and need for the project balanced with a good pragmatic justification. Once you have some of the hard lines figured out; the budget and the timeline, you can turn your mind to the magic and the poetry of the project.*

Remember there are many, many applications that a jury will be reading- I have heard with Canada Council the jury spends an average of 6 minutes per application- they are pre-reading for days, then as a group discussing the merits, identifying any weaknesses and looking at the images that support the application.

*You need to be concise and clear in your thinking, and not leave any “but why, how or who” in the jury’s’ mind..*

I personally find the grant writing process both hair pulling and incredibly clarifying for my own sense of why

I want to do what I am proposing.

**Have a few good readers/editors on board** who can do cold reads for you and give constructive feedback.

There are usually very tight word/space counts for each section and the hardest part can be editing down what you want to say to fit within the confines allowed.

**Do not go over word limits!**

Do not use hard to read fonts- be nice to the jurors.

Once you have done an edit down to the allowable size, **go back and reread the application information** from the funder- **check the language and expectations- then reread your application**- I usually find I do a few tweaks again after this.

*Think of grant writing as being a craft like any other: It takes time, patience and practice to get good at it.*

**Every grant I write- whether successful or not, feels like “time in” practicing the skills needed for sourcing funding.** Sometimes a grant may be unsuccessful just because the timing was wrong, or maybe the competition was too high. Put it away and re-read it in 6 months; you may see then very clearly why it was not successful, or you may suddenly realize that a part of it can be used for another application and the project will morph into something else.

*An unsuccessful grant is not a waste of time, but a part of the process.*

*That said; no one likes rejection letters so start off on the right foot by knowing you are applying to the right place...*



And if you don't get the funding...

**Once your ego has recovered:**

Call the grant officer and ask for feedback from the jury.

Grant officers usually take notes during the process and there may be very helpful information for you to take for how you craft your next application.



## Again...Back to that budget

When a jury is looking at your project, the budget needs to support your description of the project, look reasonable and support the feasibility of the project.

- Take a look at suggested artist rates on either Carfac or Socan websites and use these to build up your artist fee section.
- Many partner organizations will expect to take 10-15% in administration costs to cover their own expense, so make sure you know from your lead partner organization what they will be expecting, and build that into the budget.
- For a large, multi-partner, multi-artist project I build in an artist's project management fee that pays me to oversee making sure everything is moving along, reminding folks of monthly invoicing, covering my meeting/email time etc.

*In your application you need to state what actions you are taking to ensure the success of the project; having an able arts administrator listed in your budget can be referenced to show how you are building the framework for a project to succeed.*

Don't underestimate the amount of administrative work that will be required in running a larger project; build in a lead artist admin fee for someone to do the "big picture" work.

## Project Management: Getting Started



- **Managing multiple roles**
- **Using your timeline and narrative**
- **Planning Notes**
- **Marketing**
- **Community consultation**
- **Project documentation**
- **Project communication and effective meetings**
- **Communication tips**
- **Responding to change**
- **Working Documents: keeping organized**
- **Tracking spending**
- **Managing multiple partners**
- **Time management**
- **Getting and keeping organized**
- **Finding your administrative seasonal rhythm**

Project management plays an important role in the success of a project. Aside from leading community activities there is also the event planning, remembering details, communication, marketing and daily tasks that add up to a whole lot of computer time and paperwork. **The key for me to project management is clear communication with all partners, effective time management and building systems for myself to follow in tracking events, spending and other record keeping strategies.** The following are suggestions that cover both methods for project management and also highlights topics that need consideration for public events.

## Managing Multiple Roles?

**If you are both a lead artist and the project manager, do as much front-loaded admin work as possible before the project begins!**

I set up all of my budget tracking sheets and do as much of the marketing work as I can, basically- I create all of the documents outlined below- before the project starts.

Then when I am in the thick of it, I can spend less time on admin and just check in to complete the work I left for myself to maintain or publish online.

## Using your timeline and narrative:

**Once you have an idea of the overview, or, “ the what” written to create the big picture, starting to flesh out the smaller activities is helpful.**

I find in the projects I take on there are often multiple artists that are leading various components.

Having short workshop/event descriptions are useful in the grant to show more specific content as a part of your timeline, **and these descriptions once written can be used again for marketing purposes.**

Why do the work twice!

**Building the Bones.... A framework everything else can hang on**

*This is where the grant you have written works for you- you have already done much of the work for your marketing info, and can pull text from the grant application, tweak language as needed and you are good to go!*

When building a timeline that includes workshops or events, write a short description for each activity.

This brief description can be in the grant application timeline info, and then can be pulled and used for your marketing.

50-75 words is a pretty common length for most print and online marketing tools such as recreation guides and it works well for posters as well as web applications.



### Workshop description example:

1)

Working with English ivy and other local unwanted plant fibres participants will learn basic twinning techniques in weaving and make a small basket; from beginning a piece to shaping forms and finishing. Participants may come for one day, but are encouraged to register for all three and continue developing their newly learned skills. Ages 13-24 years. Instructor: Todd Devries ( 59 words)  
add in dates and registration info

2)

Tracy Williams will talk about her seasonal foraging process for her weaving and bring examples of works made with locally harvested materials. Tracy will demonstrate how various plant and animal fibres can be blended for different results and **participants may have a chance** to try their hand at spinning. (49 words)

### In these two descriptions notice an important detail:

In the first, participants are set up with a specific expectation of what they will be learning and it is very product oriented in its description.

In the second description the use of the word **may** sets the tone for an experience that is much more process based and open ended.

I am very careful in the words I chose for the expectation I set of what participants should expect.

Using words like **may** instead of **will** or **could** instead of **shall**; allows for a more open process-based experience. Keep this in mind for what seems appropriate for your style work.



## Planning Notes



**A left-over from my art programmer days;  
Create one list of all the workshop/event descriptions for the public components  
that you are planning as a part of a series or large project.**

### **Include with your description:**

- Instructor/leader-
  - Location-
  - Date(s), time and number of sessions  
i.e.: 6.30pm-8pm x 4
  - Also include max/minimum number of participants, or drop in vs. pre-reg information
- If I have a cost fee formula for the workshop I include it here

Example: 250.00 artist fee + 40.00 materials cost

**This document becomes your “master plan” that you can refer back to whenever you need to. It can include any organizational notes that are useful for you.**

**Putting the workshops in calendar sequential order begins your timeline.** I then copy this document and re-label it as “**public descriptions**” and strip all of my planning notes off; leaving the dates, any public cost, location, time and instructor.

I include the project name initials in the file name as well i.e: UWP public descriptions would be the file name for the Urban Weaver Project document.



### Guess what?

**You now have a HUGE chunk of your timeline, budget AND marketing content sorted out!**

You do not need to plant new seeds every time you turn around, but should be able to build up from the start a working document that is pragmatic enough to be useful in the project and descriptive enough for your grant. Specific language can be tweaked as needed.

For instance: a project description for marketing to youth may not be the language used in your grant application.

## Marketing



### First off brand your project

If you applied for a grant chances are high you have a name, now find images or something that can be used as a brand I.D.



## Get yourself a project email account:

You can set up to have emails forwarded to your personal account, but as this account will go out to the public far and wide, not using your own is a good idea. When a project is done I put up an auto reply letting folks know that the project is over, sometimes directing them to another email or website for other projects or further contact info.

## Project Website:

This is a great way to archive past activities, post upcoming workshops, link to your facebook project page, post photos etc. I use Wordpress and it is free if I keep *.wordpress.com* in the address, I can manage all of my blogs easily and in a day can set up a simple site I like the look of. If you have never used it before and are new to websites I recommend finding someone who can give you a bit of a tutorial so you familiarize with it- but no html code is needed and it is fairly user friendly.

## e-newsletters and online registration services:

I send out a monthly **mailchimp newsletter**, it is free, and easy to have links on websites for people to sign up and stay connected, and unsubscribe if they are no longer interested in my projects. There are other services out there so do some research- start looking at the bottom of any newsletters you may get and see what platform they are built on. Again, someone who can hand hold to get you started is helpful- but with time and patience you can do it on your own . **I also use Eventbrite as a registration link.** It is easy to copy and paste my information into an Eventbrite event listing, and then I can publicize workshops and have folks register knowing there is a maximum for registration, and also have easy contact with registrants if I need to send out more information about the workshops. This is a very easy service to use, but be aware folks will register and many won't show up- I now "overbook" to accommodate this.

## Work with your partners!

If you are working with a community centre or other organization that does print guides of classes etc., find out the deadlines- expect anything from 3-8 months ahead of time as a due date. The basic descriptions written for your time line and grant application may be very helpful here.



## Posters?

### *OK, my dirty little secret now public....*

I don't have Photoshop on my computer, so I use PowerPoint to design simple posters. I can set up the image and logos and title etc, then 'copy slide' and change specific info for other events in the project. I make them mostly black and white for cheap copying and PDF them individually from the main PowerPoint document.

*A HUGE timesaver!*

**Print Costs:** It may make sense to have some posters or hand bills for events, but I find mostly I end up using word of mouth, and having a business card with the project name, email and website and artists names listed is very helpful to have in a pocket handy for folks to follow up with later on.

Posters often are time sensitive, so consider what makes the most sense both for paper use and your printing \$.

## Logos:

Partnering organizations likely have a logo they would like to see ( as will funders!) on any print matter, websites etc. get logos from your contacts or download from funders websites. **Find out about logo use;** the city for instance has protocol for logo use- the Vancouver city logo should go to the left of the Vancouver Park Board logo on anything they both appear on. The City of Vancouver has a contact person that all logo branded advertisements should go through- find out who- and give an additional 5 work days minimum for the approval process before printing- then you have a bit of leeway for sick days/ holidays, changes etc. Many funders do not want their logos on a coloured background- using a white strip at the bottom of your posters can suffice as a place for logos to line up. Also, Canada Council and BC Council for the Arts have size requirements- check online for appropriate logo use. You may want to have 2 sections: Project Funders and Project Partners to distinguish who you are working with and who is funding your project. **Be sure and keep a consistency of size from one logo to the next. Keep a file of logos in your project marketing file for easy access**

## Artist Talks:

Often, scheduling an artist talk or a series of them at the local community centre is a great way for getting word out about a project, getting community feedback and project involvement. **Think of this as both a marketing and community consultation opportunity** and build talk fees into either your marketing or community consultation budget-line. Don't forget to advertise the event heavily! Flier the centre, local shops or cafes- I have even gone into community centre classes at a class start and introduced myself to the instructor, explained the project and given info about the talk to class participants if I thought there was a similar interest cross-over.



## Community Consultation



*Most Community projects need to have some sort of consultation, input or building project awareness component.*

Check-in with your project partners, if working with Parks Board and things will be situated outside, there may need to be signage posted for a period of time, or notification out to surrounding households. Ask your partners for usual protocol, put this into your time line and also include any printing costs for fliers either as a hard cost, or as an in-kind, if your partnering organization is helping with one or both the printing and distribution.

*Think about how to draw people out- serving tea and cookies or a fruit plate is often helpful, but also have an opportunity for feedback to gather information from community. Be creative in ways an artist talk can be an interesting part of the project and a method for people to get a sense of who you are and what you are hoping to do in the project.*

### **Special Event Permits:**

If you are in a city park for an organized event with any group size you need a permit!

If you are partnered with Park Board, fees can likely be waived for this other-wise charged service (another in-kind note for the budget here). Talk with your Park Board or Association programmer, set dates and get applications in a.s.a.p., Even if you have a small group that will be working outside this is a helpful step to know you won't be surprised on the day of your event by a film crew that has booked the park, or another large group that may be a disturbance to your event.

## Project Documentation



Documentation is a very important part of your project, and should be acknowledged in some way in your budget.

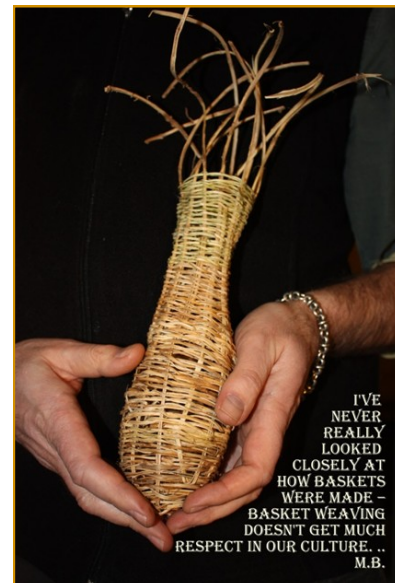
There are various methods of documentation including;

- photo based
- film/documentary
- Website
- story gathering

*Give thought to how you can capture the project in as many ways as makes sense throughout the project.*

I had the good fortune with the Urban Weaver Project of having an exhibit for the work being made by community at Britannia Gallery in the middle of the project. I decided as a part of the exhibit to use photos of participants' hands holding the work made, and asked the participating community makers to write a sentence or two for me about their experience in the project, what they had learned, or something about the process or community that had formed. I wanted to use the quotes on the photos as a part of the giving multiple voices to the exhibit.

I was blown away by the articulate, thoughtful and heartfelt responses that I received, and realized what a boon this was for gathering feedback from community and having these comments to include in my final reports was fabulous.



Now I think about how building opportunities like this into a project can participate in both the evaluation methods I use in a project as well as assist for final report requirements.

## Photo Waivers:

Photo Waivers should be used whenever possible if faces will appear in your images.

If nothing else it sets up the conversation for people to know that photos are being taken, and if you have an awesome photo of a mom and child in your project and want to use it for print or publicity, you know you can.

*If your website is going to have project images with participants and be linked to a city website, the Park Board, or a large organization you need to use photo waivers. Most organizations have a blanket form they will provide you with.*

### A waiver should include:

- Make sure it gives use of the image/ writing/ participants involvement to the artist, photographer, and for organizations you are working with
- State images may be used on websites and in print to promote the project, the artist work, and the organizations involvement
- No fees will be paid for use.

**Note: Children or minors require a separate form with parent/guardian signature.**

## Become an expert at documenting hands at work and over head shots!

If waivers cannot be used because of the event style, make sure photos do not have faces in them, and let people know as you are taking their picture you are just taking hands/ over head shots. The beauty of digital is that you can show the person the image on the camera, they can see what the image is that you have taken.

## What to do with Waivers?

If you are working with an organization, they may want to keep them on file, otherwise, start files of your own. Keep waivers on record for each project in a separate file under the project name for easy recall if you every need to find them again, or file by month or year (depending on how many you have- 1 file per year might be fine). On sheets with multiple names, I write the date and the workshop event at the top.

## Large groups and photo waivers:

**With large groups, with no close ups;**

Post signs visible saying the project and participants are being photographed, and give folks the option to let photographers or the project organizer know if they have concerns about being documented.

*For large events that will have documentation, there are a few things I do to try and cover the bases.*

- If possible, have a volunteer that follows the photographer and asks for waiver signing and assists the photographer in getting waivers for the images.
- If you have a guest book or sign in, you can have a waiver clip board at the same spot with a volunteer, and have nametags that get an identifying mark ( green dot) meaning photos ok and waiver signed , and an identifying mark if photos are not ok ( orange dot).
- If the photographer sees someone has no nametag, they can direct them to the sign in area and receive a nametag when they sign in.
- **I use wooden clothespins that people can write their name on after the sign a waiver, and the clothespin acts as an ID tag for the photographers to know pictures are ok.**

## Project Communication: and Effective Meetings

*Having shared expectations with your project partners is really important for the success of your project!*

You can help this along by having clarity in communication/ and setting up fair expectations for all parties.

### Running a meeting?

Chances are high you will find yourself requesting meetings with various partners, make sure your get the most out of those meetings by being prepared and making the most out of your- and everyone else's time!

Usually, I am calling a meeting because;

I need to gather info in particular areas

I need to inform project partners/other artists where the project current stands re: upcoming events

We need to problem solve specific issues and figure out who is doing what

## ***ALWAYS have an agenda of what needs to be covered in a meeting;***

**it helps to let others know too what specifically they will be talking about ahead of time.**

- If someone else is going to be addressing a specific issue- put their name beside that topic point.
- Sometimes I email out a meeting agenda a few days early, especially if I am asking someone to address an issue- but often just showing up with a few copies for people to refer to is enough.
- **Take notes-** if you are not comfortable leading a meeting and taking notes at the same time- ask

The main notes that need to get written down are any task items that are to be done, who is doing them and by when. Also make note of any financial numbers etc. that need to be fed into a budget.

If it is a very complex meeting- meaning lots of things were discussed and there are all kinds of things that need to be followed up on by various people, you can end the meeting by doing a round table. Everyone says what they are following up on- this can be a streamlined way of pinpointing what/who/ by when; and gives a note taker a chance to double check what they have written down.

### **First Project Partner Meeting:**

When you meet with a partner for the first time, especially at a community centre, think about what of these things make sense to be on the agenda for your project- specifically look at your budget and timeline to ground yourself in what you need to establish.

### **Insurance:**

Can your partner organization add your project to their policy? If yes, get an in-kind amount to list on your budget

Facility: When do you need space on site? Check bookings, book space, and note this is an in kind cost- find out a general amount you can list on your budget.

### **Storage:**

Need It? Community Centres are notoriously shy on space, so find out what is available, be prepared to think creatively about where you can store stuff, and when exactly you need it.

### **Support Staff:**

Find out what is possible for the partner's perspective, and what your requirements are- don't assume staff support! You may need to budget this in, or else think again of in kind for support you will receive.

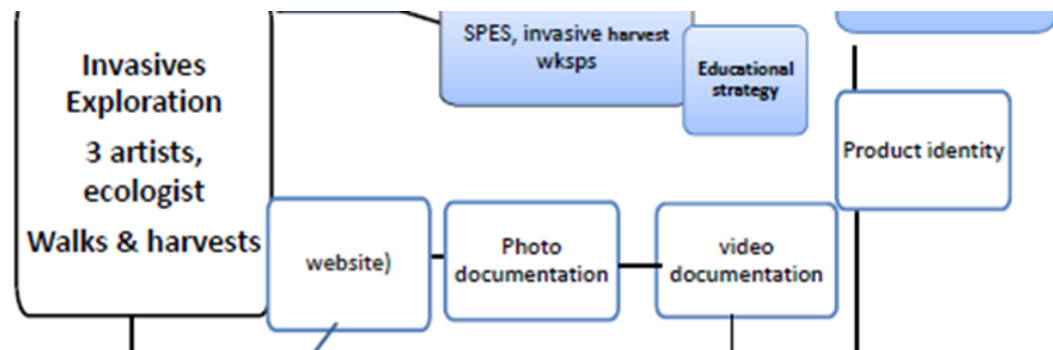
### **Grant partnership:**

Confirm the organization can be listed as the lead for the grant application- that they are eligible from the funder's perspective and that they don't already have another grant going in, or outstanding uncompleted final reports.

It is not a bad idea to even draft a simple letter of understanding between yourself and the organization stating who is taking on responsibility for what- basically acknowledging what was agreed upon in your meetings. Sometimes staff can change mid project and it is very helpful for the new person coming in to see what is expected of them in a project.

### Mind maps and flow charts

Sometimes project partners may have a hard time understanding the creative process. To help people understand there is a process you are guiding it can be very helpful to sketch out a flow chart of what the steps will be in the process you are undertaking. This can assist with building trust for partners who are unclear what is happening or where the project currently stands. A mind map can be built with community involvement during the consultation phase around any theme being explored, and a flow chart can outline what the steps are in how the process will be unfolding with your leadership



### Communication Tips: the good and the challenging

- Sometimes a phone call is not only faster and easier but also more human for relationship building. If need be, arrange a phone meeting time through email. We get caught up in emails these days, and too much information in an email can get lost to the reader.
- Follow up with an email that bullet points the key points of the conversation, so there still exists a “paper-trail” for both parties to refer back to and confirm who is doing what/when.
- If you will not be checking emails for a few days, use your out of office auto reply (I do this when I need to focus on writing, or if I take “my weekend” mid-week.)
- If you receive an email and don’t have time to respond right away, email back and let the person know you will answer them a.s.a.p. but are busy at the moment- sometimes emails do get missed or caught in a spam filter, and folks can be left wondering if you got the email. In our technical age of little manners this is a courtesy that goes a long way.



- **Thank the people that go out of their way to help you!** Often people in partner organizations will assist you when it is outside of their job description- don't take this for granted, say thanks, and let folks know how their assistance has made your project better. This gives people a sense of involvement and ownership in the project and helps you build lasting relationships that can go forward to other projects.

*A community engaged art practice is hinged on having strong relationships in the community; so work on building long-term trusting relationships of mutual respect with your project partners.*

*If things begin going sideways address it quickly; Be frank, honest, thoughtful and considerate.*

*Problem solve together how to best remedy the situation.*

### Responding to Change...

#### **WHO knew THAT could happen?!**

Stuff happens that no one can foresee and that throws even the best laid plans to waste.

Remember that how you choose to respond in a changing and challenging terrain is what identifies you as a professional and often is what partners remember for whether they want to work with you again. Take deep breathes, strategize what can change, and regroup.

**Having effective working budget sheets comes in VERY handy here....**

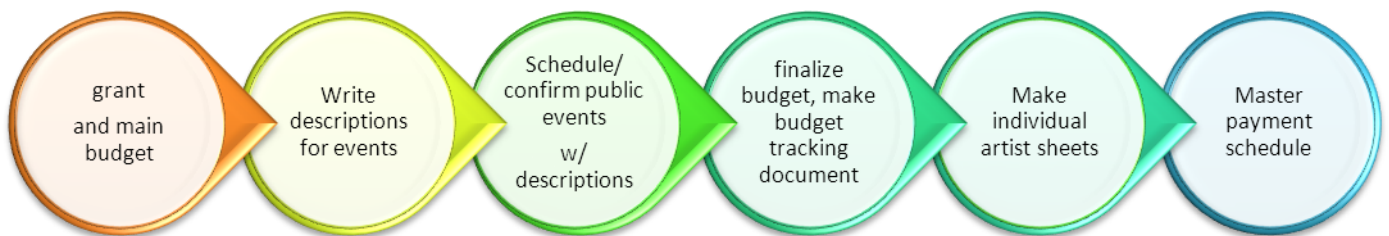
**If your project shifts markedly from your original proposal call your grant officer to tell them how your project has changed; let them know what happened and how you are responding to the change.**

**Keep notes for your final report!**



## Working Documents: keep organized!

For me the key to being able to be involved in project as both a project manager and community facilitator means being highly organized from the start. The documents that I create flow right from the beginning through to the project final report building on each other, a flow chart of the documents I make looks something like this:



### Budget and Events- nail it all down:

Once you know how much money you are actually receiving, go back to your original budget and shave off as you need from the various areas making sure everything still balances for revenues received from your various sources. Do this as a new document, keep your original as a reference, just copy and paste the whole thing into a new sheet and label it final budget. How many events or artist fee times do you have? Talk with your partners about dates and times for events and finalize the master schedule for workshops

See the excel budget spreadsheet list on the next page.

### Tracking Spending:

**My disclaimer:** I have absolutely no accounting training whatsoever... and I do believe I already mentioned I am a math drop out. But, having said that I also have managed a budget over \$70,000.00 with multiple partners, artists and phases and come in underspent by \$1.00...

**So it IS POSSIBLE to figure it out- you just need to build yourself the infrastructure to follow.** Here is how I do it- I am sure it is again not the only way and likely not the best way- but with limited excel experience and no accounting background- it works.

I end up with multiple excel spread sheets for any given project.

*Basically, I build a map and leave myself trails of breadcrumbs so I know where I have come from and can work my way back through my logic of the spending decisions I made months back- any notes you leave for yourself help in this process!*

**Excel Budget Spreadsheet List**

- **My original request spreadsheet from building the project at the beginning:** I keep this intact for reference to look back on if I need to untangle and solve where money was to go, and where it has been cut from as I shave down the budget once money –less than requested –eventually comes in.
- **Specific budget sheets per grant:** These can get into the nitty-gritty on specific budget lines for different grants.
- **Workshop schedule**
- **Payment schedule**
- **Final Budget Work Sheet:** Once money is confirmed from all grants that have been received you can build a new budget that is the actual working document, cutting where you need to from the original request. Once this budget is finalized I

Please see the Spreadsheets that are the appendix to this document as examples

**Budget Worksheet**

Your Final Budget top column might look something like this:

07/12/11	Park Board	CNAD-city	Canada Council	Tides:Colette Foundation	total	Paid Out	Remaining	Notes
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- Total should equal the amount of all funds received
- Paid out is what has been invoiced to date
- Remaining is the total minus the paid out
- Notes are where I track anything I need to remember: from invoices sent in early, who is handling that money to what might be included in that area such as printing cards or admission fees for things like the culture crawl

**Date this document!** Every time you go to this document and update it, **update the date** in the top corner- this makes it easy to remember where you left off if you don't get back to update for a while...

## Managing Multiple Partners:

You might find you have multiple organizations holding money for a project-specifically since artist collectives can apply for Canada Council funding, and you may have different project partners each having the funds from a specific grant received.

If this is the case build a spread sheet schedule for payment tracking of who is paying who, when.

Example:

Project name here	Payment amount	MOPARRC Payment schedule	Evergreen payment schedule	status	Canada Council Amount	CNAD Amount	notes
Artists name - Pan flutes <u>wkshops</u> 4 x \$250	500ea EVERGREEN MOPARRC	David 500. Aug 7	David 500.AUG 25	Mop y Ever n	500	500	MOP wksp Aug 7-25

## Workshop schedule to spread sheet:

I break down the timeline of the project or public descriptions document into an excel workshop spreadsheet that holds the information in a way that is easy for me to confirm details like dates, who, where and how much is being paid.

**This is what the top row of my spread sheet looks like**

Date	Event	Fee	Artist	Contact info	Notes	Harvest needs	Artist Allen	Artist Barbara	Artist Claire	TBD
------	-------	-----	--------	--------------	-------	---------------	--------------	----------------	---------------	-----

The spread sheet then runs down the page in calendar order, all January, then February events etc.

The event name and contact info is listed on this as well as any specific notes and harvest needs- (which makes sense in my world) for quick reference.

**Artist Name:** under the artist column I put the workshop leaders name or initials; this is right beside the fee column

Artist A, B or C- put the name of your project artists here- use as many columns as you need, **have a To Be Determined column if someone has not been pinpointed to be paid for a payable event that is planned.** As event leaders are confirmed, you can move the \$ amount from the TBD column to the artist who is confirmed.

Having the TBD column allows you to keep track of what is not yet booked, but also gives you a place to acknowledge the \$ that is budgeted for that event.



## List all of your payable workshops/ community activities on this sheet.

When I am drafting this spreadsheet, if \$250 is the event fee for 1 artist I will list their name, and then put 250 in the column that their name is listed under. I use a zero under the other artists names,( as I sometimes find excel auto-sum does not add correctly with blank cells).

Example:

Date	event	fee	artist	Event contact info	notes	harvest needs	Artist Allen	Artist Barbara	Artist Claire	TBD
		250	A				250	0	0	
		250	B				0	250	0	
		250	C				0	0	250	
		250					250	0	0	
total							500	250	250	

This tracking method may seem onerous to set up, but I can easily cross reference to my timeline and payment schedule.

**By doing a simple auto sum tabulation down each artist's column I know that what I have listed matches both the payment schedule, and that the TOTAL amount for all workshops matches the workshop budget line on the master budget.** If I am trying to balance workshops and fees evenly between artists, I can also easily see who is getting what, and make shifts when needed by quickly identifying what to move.

## Payment Schedule

**Drafting a payment schedule based on your main budget and workshop sheet is crucial!**

It helps you know exactly what has been billed, and what invoice amounts need to be each month or payment term.

**Talk with your project partner who is holding the money and writing the cheques.**

**Find out:**

***Do they write/sign cheques weekly or monthly?***

There may be a particular day of the week or time of month that cheques are signed, so knowing when to get invoices submitted can assist for prompt payment.

***Can they deal with monthly invoices from artists, or do they want to pay out more money and do cheques less often?***

Tailor your payment schedule as it makes sense for the financial culture of your project partner.

Your Workshop schedule in a monthly format is very helpful for being able to grab info for each artists monthly workshop payments.

## Breaking down large payables:

You may also have regular scheduled payables such as research, web development, documentation and administration. Decide on how best to break these down over the project duration and schedule in to regular payments.

Note: it is common to hold back some money until the project is complete. For admin fees, keep some money as payable for when the final report is submitted.

**Example of a chart for a monthly payment schedule where there was payment for multiple areas; web development, project administration, studio research and instruction.**

Lead Artist	web	research	admin	instruction	total
Sept	375	1000	125	0	1500
Nov	156.25	875	593.75	62.5	1687.5
Dec	156.25	875	593.75	62.5	1687.5
Jan	156.25	875	593.75	62.5	1687.5
Feb	156.25	875	593.75	62.5	1687.5
total	1000	4500	2500	250	8250

On one spread sheet I can have multiple artists in various charts listed as above, and quickly verify that individual invoices are for the right amount, and if I need to change the master budget I can break down where the money has been allotted.

## Don't forget to balance!

If you make changes on one sheet, don't forget to go and make the corrections on the other sheets that reference that \$ amount. Excel does have a function where you can link cells so \$ amounts change automatically if you want to get fancy, or don't trust yourself to remember but I like to do it myself, as it keeps me using the sheets I have made. The more you use or refer to the spreadsheets for information the more familiar they become and faster I can do my budget work!



## Time Management



*This is such a huge thing for the success of any project!*

**Knowing how much time something is going to take- and then thinking ahead in planning to foresee what is up ahead that will require your time.**

The only real way to get a good sense of this is to have a project you track- even track a few different types and this will give you a sense of where your time is needed- and assist you in future budget planning too for project management on new projects.

Make a list of the basic areas that are involved. Being able to look at a new project, and gauge where it is the same as another you have done, or where you perceive difference will be, gives you solid ground work to base projections on in any given project

- Start a sheet with the project name at the top.
- And then labeled columns or sections for marking time.

I use a “4 tick and stroke through” method for marking time and keep a paper copy near my desk, when I shut down for the day or every few days I remember what I did and make the appropriate ticks- Don’t leave it too long! I find I can roughly determine about once a week how my time was spent- my task list and day-timer help jog my memory. I like a paper copy instead of on my computer as I often think to do this when my computer is shut off, so a little book I can quickly grab works for me.

*I first started tracking my time when I was being mentored by Haruko Okano and she suggested it as a way of knowing where my time went and then being able to make goals on where I would LIKE my time to go... It was a VERY insightful way of seeing how I spent my time!*

For that exercise: ( which I highly recommend) for a month be an avid clock watcher- note how much time you spend eating/prepping food, sleeping, household stuff, family/friend stuff, job/work, down time, art-making, administration, exercise time, travel time- whatever is relevant to your life. At the end of every day gauge where your time was spent. At the end of the month you can take stock and make shifts as to how you consciously choose to spend your time-knowing where it really goes....

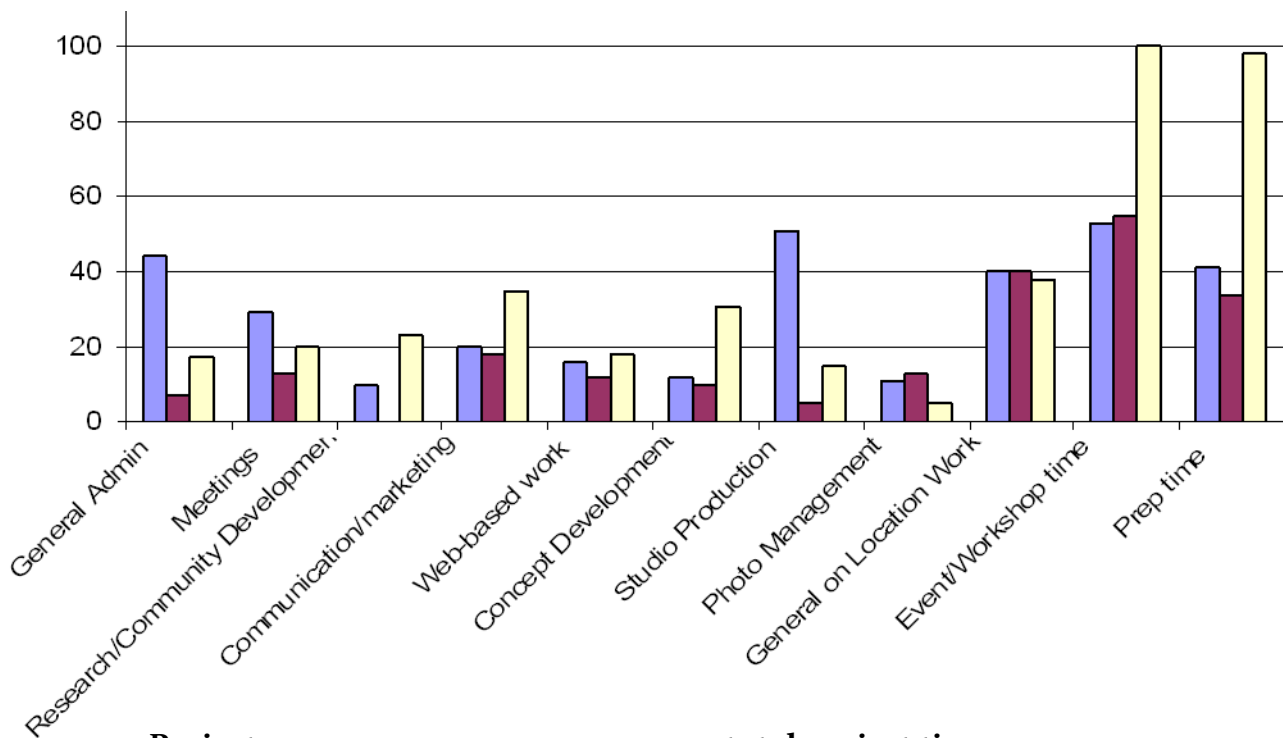
At this point I no longer track my time on projects so specifically, as I have pretty good understanding of what is required in the projects I take on- but I can see returning to this again in a few years' as my work shifts.

**I think it is a useful tool for anyone, especially for artists when what we do can sometimes feel so nebulous and hard to pin down.**

For me, I have found fairly consistently that for every 1 hour of community workshop time, I need at least 3 hours for project development, material gathering, meetings and marketing.

Knowing these particulars about your own work will really help solve the problem of not being frantic, overextended and causing burnout resulting in phrases like... Never Again!...

**Here is an over view of some different projects from the last few years**



**Projects**

**total project time**

1<sup>st</sup> column: MOP garden

327 hours

2<sup>nd</sup> column: IVY PROJECT

204 hours

3<sup>rd</sup> column: COAL HARBOUR Residency 400 hours



# Getting and Keeping Organized

## Monday Morning Meetings

**When is YOUR Monday?**, Sometimes mine is Tuesday, occasionally Friday- but more and more I actually use the real Monday as my check-in day...and that is what this is bit is about.

In most organizations people have project meetings on a regular basis to check in and see what is going on, and bring everyone up to speed on upcoming issues. Most artists work alone- even community engaged artists do a huge amount of their work alone- but I find I really need a weekly check-in to focus myself.

## Plan the Work and Work the Plan

That saying is very trite- but very helpful!

So, whatever day of the week is your Monday, make a point of taking stock:

Make a list of what is coming up that you need to do, look at the list from the week before and give priority if needed to the things that did not get done the week before.

Look at your project time line that you drafted for your project (yes! This should be helpful for you, and not just something that the funders wanted to see.)

## The Art of List Making...

- Look ahead a few weeks and note the big projects that you need to break down and get some of the simple tasks done
- Stay away from list items like “write grant” and be more specific: “write 1 page project outline” or “edit key partners page”
- Make list items smaller, more directive points that you can focus on- not be overwhelmed by.

**I find for me it is partially the psychology of it; having smaller mouthfuls to chew on allows me to not be intimidated and I get to cross things off- the act of crossing things off gives me great satisfaction and keeps me moving to new task items.**

- Balance the big tasks and the small tasks:  
Give yourself a variety each week- some tasks will be more mindless and others require more concentration- then just look at the list and choose what is the best thing to work on that day, morning etc.- it all gets done when you just plan the work and work the plan.

**I start a list each week, and then highlight each morning what I want to accomplish that day** it gives me a visual focus on the list- (Some year I am going to keep my lists and make a project out of them.....)

**This way I spend no time wondering what I should be doing, or fretting about the amount I need to do- it just gets done in a very logical way with no drama-** other than when I have to swear at my computer, which still happens.

- list all the emails you need to send out for communication on moving things forward- I try and get these done first as I find them quick simple tasks to cross off, and it then gives me a few days to get responses back and feel like the follow-up planning is completed through the week.
- Don't forget to list meetings that week for which you need to draft agenda items.



For me, I find Mondays are always scattered as I try and get my bearings on moving things forward, answering emails for multiple projects, website updates, whatever; as the week moves along I can get the “high brain-function” work done on Thursdays and Fridays. I try and schedule meetings to keep those days free so I have the mental space to get into a writing groove and stick with it.

**Spend time thinking about when your high productive times are and create a loose framework to build upon.**

### **Each Month**

**Start the month off by giving yourself a good overview of what is on your plate for the month.**

**If it is a grant to write or building a project website- break bigger tasks down over the month so you don't get caught last minute with other emergencies that might pop up and take your time.**

*Taking a day at the start of each month to overview the admin stuff; both clean up and looking forward, will help you stay on top of the project and make final reporting time much easier!*

### Each month... Check your budget

- Note expenses that have been paid out, note what invoices need to be received or have been paid out and track that in your budget. Change the date so you know when you last updated the document.

### Refer to your Project Timeline

- What meetings or workshops are upcoming? Make appropriate lists for any project partners that need to be contacted, make workshop supply lists and any other detail oriented tasks that should be spread throughout the month

### Look over the month past

- If you take a minute now to remember workshop participant numbers for reports it will be so much easier later!
- Sort any photos that haven't been sorted yet (the delete button is your friend). Add any favorites to a "best of" file that you can select from come report time, change file names to include the name of the photographer for any files sent to you by other participants- then you have photo credit handy should you use photos other than your own.

## Finding Your Administrative Seasonal Rhythm



I realize that in my art practice spring, summer and autumn keep me hopping with projects in process as well as grant writing for upcoming projects.

This is no time for learning new skills with ease!

I try and foresee what things would be helpful for me to learn to streamline my admin time, or further my art practice and take on teaching myself new skills in January when things are quiet. Over the years this has been when I have honed my budget templates for my bookkeeping, and learned how to use various online tools like Eventbrite, mailchimp, updated my website etc.

**Give thought to when in your annual rhythm is a good time to learn new skills, and prioritize what is going to serve you best first.**

**Small steps!** Don't frustrate yourself by trying to climb a learning curve under time or project pressure.

## Final Reports

**I think a key to the sustainability of this kind of art practice is being able to live with grace in 3 time zones simultaneously ...**

*Past- final reports*

*Present- the project you are living*

*Future- writing the grants for the next project you can visualize*

This is no easy task!

*It helps if you can be as organized as possible IN a project- staying up on your admin details so writing final reports becomes a snap of just pulling your stats, images and other info together.*



**When you first get word that you have gotten your funding, find out what the final report expectations are and set up a plan for gathering information during your project delivery.**

Example: If you need to know how many people are coming out to regular events, have a sign in book. If you need to track by age groups- have your sign in book list those categories.

When you go through the project book you can easily add up your children or senior participant numbers.

## For evaluation you can also build in a framework for feedback such as:

- Comments page on website
- Develop project milestones that allow for gathering feedback
- Use Eventbrite registration; it allows email contact and participant lists
- Don't forget regular meetings with partners for ongoing communication and problem solving

## Conclusion



*Learning to see arts administration tasks as a part of the art practice is an import step; what we are doing in this is not just a supportive role, but actually a big part of **THE WORK**.*

By learning to appreciate the craft of creating a balanced budget, writing a fantastic 'must-be-funded' grant, and dealing with the nitpicky details of project management, with pride in the work we are doing makes a huge difference to one's psychological health!

Instead of feeling like you are impatient and need to just get this icky bit out of the way, recognize the time you spend in setting up your administrative structure and project rhythm will enable you to enjoy the project process of engaging with the community you are working with more fully and give you the time needed to be thinking to what comes next. **Appreciate the craft of each step**

It is not always smooth or pretty, and sometimes I fail miserably at being as organized as I know I am capable of.

This document is my best case scenario presentation; you might not be able to do all of the things mentioned, sometimes I can't either- but I know when I do follow my own advice it pays off and helps me get and stay organized- so I can enjoy the project process and not be overwhelmed.

I hope this is useful for you!

## Acknowledgements

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- Renfrew Park Community Centre
- Renfrew Collingwood Senior's Society
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- Tsleil Waututh Nation

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