

CHAPTER THREE: THE A TO Z OF PROJECT MANAGEMENT

This chapter is about getting what you need to make your art possible. You already have the fire and the devotion. They make you an artist. If you like, this is about the armature for your model, the foundation for your building. Planning and organizing, getting professional help, winning grants, and dealing with money professionals may not be the most attractive part of being an artist, but they can assist you in meeting your goals. Your success is determined by those things you have actually accomplished, not by the tasks you still need to accomplish. That awareness gives you control when shaping your world.

More perhaps than elsewhere in this guide, the sections in this chapter should be viewed as providing suggestions, guidelines, and starting points. Success in the cultural sector essentially results from being unique, finding a new angle, seeing things in a different way. These sections will help you start off on a secure footing toward discovering and realizing your own vision of success.

HOW CAN I GET ORGANIZED?

Early CBC Radio drama is lost forever, because the masters were destroyed or recorded over. Silent film footage, including the masters for classic movies, is still being found in barns and lockers. The Canada Council Art Bank was revitalized simply by conducting an inventory of its warehouse. Museums have made much more of their collections available to a broad audience through digitization.

Things appear in your life, are dealt with or put aside, are thrown away or stored for the future. Ideas, finished products, bills, letters, cheques: they are all part of your work and its administration.

Nothing in life happens without organization, and the best organization depends on:

- Space to work.
- The grouping of linked items.
- Storage.
- Access.

A room of your own

Even if you are a writer, and certainly if you are not, it is important to keep your art and its administration separate. Timothy Findley (*Not Wanted on the Voyage*) built himself a little writing house in his garden. Your solution can be simpler, but be sure to allow space for your work and for its administration.

If you can spare part of a room, you can:

- Install shelves.
- Make a desk from a pair of two-drawer filing cabinets and a used door and add the best desk chair you can afford.

Cost? Go to charity stores and pay very little. You can pay more by buying new, but why bother?

Layout & organization

Possible **office layout** for a right-hander:

CURRENT You often need to check these	CURRENT You are working on this	ACTIVE and sometimes on this
ARCHIVES Waste basket and occasional use	You at work	ACTIVE You refer to these sometimes
STORAGE	ARCHIVES	
Stationery, supplies and old files	Recent projects & reference sources	
OFF SITE Archives & storage		

Current, active, archive, and storage are levels of activity that apply to everything you do.

If space is short, you can set up a portable office. As a suggestion, you might have three accordion files near a telephone. Label them:

Current: one or two projects, contact lists, agenda.

Active: other ongoing projects and plans that do not immediately require attention, reference stuff, your expense receipts, and income paperwork.

Archives: household, insurance and bank paperwork, defunct or on-hold projects.

Plus:

Stores: a box of old paperwork – under the bed?

Current

Standard advice (“Only touch a piece of paper once”) only works if you have a regular routine involving few variables. This is not our life. Whatever you can simplify and organize, however, will save time, in both your art and its administration.

Active

Let each project's files grow organically and add new sections as the structure becomes clear to you. Each project begins in its own container; as soon as sections become apparent, give them their own containers.

Archives

Back up computer files regularly, both on the computer's hard drive and on CDs, DVDs or other portable media.

- Make extra back-up CDs containing data for large projects and store these off site, perhaps with a relative or friend.
- Keep earlier drafts of work, so you can return to them if necessary. A recycled-paper basket, seldom emptied, means that weeks later, you can dig out discarded documents and give a sigh of relief.
- Record your professional work the best way you can afford.
- Keep all reviews and articles, even negative ones, whether from print or electronic sources. Remember, there's no such thing as a bad review, so long as they spell your name right.
- A record of your work and all associated reviews and articles can prove vital when dealing with clients, insurance companies, lending and granting bodies, and to remind yourself of what you've done.
- Check all your files regularly, to move them up to **Current**, or down to **Storage**.

Storage

A dry basement, with files stuffed in banker or liquor-store boxes, and clearly labelled, may pay off unexpectedly years down the line. If circumstances warrant rent a storage locker for this purpose. Canada Revenue Agency requires you to keep your tax files for six years after filing.

HOW DO I FIND A PROFESSIONAL ASSOCIATION?

Professional associations are rooted in the old trade guilds. In the Middle Ages, the European merchant class was squeezed between the Church and the aristocracy, and guilds lobbied for their members, guarded trade secrets, trained apprentices, and disciplined them for breaches of acceptable business practices.

Modern professional associations represent their members in similar fashion. The services provided may vary from one association to another, depending on the terms of their constitutional by-laws.

In Québec, for instance, professional associations are officially recognized by the *Acts Respecting the Professional Status of Artists* – S-32.1 and S-32.01. Such recognition confers specific rights and duties on both the associations and their memberships. The four principal reasons people join professional associations are: necessity because of close-shop agreements, professional accreditation requires membership, common sense, and sometimes idealism.

Membership offers opportunities for networking, lobbying, offers of engagements, protection against unethical treatment, information services, and various administrative forms and contracts.

Other associations as well as not-for-profit service organizations (which often grow from amateur enthusiast beginnings) can be invaluable sources of non-standard contacts, information, and work. Local cultural groups may be short-lived, but can be useful networking and creative resources.

To access appropriate professional associations:

Check out the discipline-specific resources from *The Art of Managing Your Career* for a list of professional associations' websites (go to www.culturalhrc.ca, click on *The Art of Managing Your Career*, select a discipline, and refer to Links).

Not all Canadian organizations have “Canada” in their titles, and the names of some international societies that start with the word “America,” like the Locals of the American Federation of Musicians (AFM), which are actually homegrown entities, affiliated with the U.S. umbrella organization.

Associations lobby on behalf of their members, work with government and sister societies to improve work conditions, and offer advice, marketing and promotional opportunities, professional contacts, professional development, research and reports, and other benefits. Professional associations offer members networking and practical help, and membership may be one of the very first steps you need to take professionally.

Before joining any group, find out the following:

- What makes it pertinent to subscribe to a professional association? If so, what are the selection criteria?
- Will membership services be useful to you now and in the near future?
- What will it cost, in regular dues, fees, commissions, and other deductions from your fees?
- What obligations will you incur as a member? Will they compromise your career?

In some cultural careers, you must join the professional association in order to work in the field. However, those with strict controls may cut you off from work offered by engagers not willing to offer the association's required fees and conditions.

When you join, commit to making the organization work. If you think something could be improved, get elected to the governing body and change things. Being involved with the association's workings can increase your professional visibility.

Whichever organization you select, respect its rules and support the members of other professional, performer, and craft organizations.

WHAT GOVERNMENT PROGRAMS CAN HELP ME?

The federal government (through the Canada Council of the Arts, Canadian Heritage, and other departments), the provincial and municipal governments all support culture. Government funds can help you to finance a project, receive necessary training, or produce a piece of work. You should frame your application to fit the granting criteria, but the first step is to find the best-fitting awards given by the appropriate agencies.

Some resources are well known, and advice on them is easily obtainable from:

- The agency concerned.
- Your professional association or other not-for-profit organizations.
- Companies operating in your field.
- Your fellow artists.

These programs are hotly contested, but you certainly won't get a grant if you don't apply. Don't throw in the towel if you fail to get a grant the first time you apply. Juries who decide the grants generally change after each round and all the money in a granting body's budget for each round will usually be awarded. Many an artist, failing to get a grant the first or even the second time, has reapplied for a grant for the same project and eventually walked away with the funding.

- Look at an agency's full list of grants for the ones that best suit you and your plans.
- If you belong to a minority group – the young, First Nations, special needs – look for targeted support.
- There are often awards administered by the agency, but funded by an endowment set up to further a personal enthusiasm.
- Check carefully; grants change.

Less well-known sources are worth looking for. Often an agency will give you a list of other support resources. The **Internet** is the most important resource for trolling for arts funding. Look for **umbrella organizations** that have lists of their members. As an example, British Columbia has its Assembly of B.C. Arts Councils.

A funding agency's name may not be immediately obvious

Saskatchewan has its Ministry of Tourism, Parks, Culture and Sport, but Quebec has the Ministry of Culture and Communications. Alberta's culture funding comes from the Ministry of Tourism, Parks, Recreation and Culture and also from the Alberta Foundation for the Arts. Not only are these names different from province to province, but also the names change, sometimes every time the government changes.

Many grants are funded by **endowments** set up in the memory of certain individuals or to promote specific ideals. They are often administered by arm's length agencies.

Museums and **schools** have special projects, as well as Artist-in-Residence programs, but you can look further afield.

Agencies and government departments not directly concerned with culture may provide funds either to answer a need you've identified, or, if you can find the tie-in, as part of their regular mandate.

A writer from B.C., for example, received a significant grant from the Fish and Wildlife Branch of the Ministry of Environment to fund a book she was writing on the wildlife of Vancouver Island, because her work was seen as providing a source of valuable information.

Your theatre company may get funding from immigrant, special needs or consumer protection agencies.

A **Business Initiative Area** or a **Tourism department** could help your pottery.

Your play could be a project of the Justice or Health departments.

Regional Development programs are available for high unemployment or disadvantaged areas.

Imagine a small band, **Charmin' Billies**, successful enough to tour from one small gig to another. To cover touring and booking costs, they might put together a Diverse Communities proposal for Citizenship and Immigration Canada. They propose to hit every provincial capital and play high-school graduation dances, promoting support for minority groups with their new compositions "Canada in Your Face" and "Great White North – not just North, not just White, just all Great."

Organizations often win grants because they have more contacts and a proven track record. The enthusiasm of a single artist, backed by the accountability of a known organization, can be a winning combination.

Make your performance youth-focused and educational. It is a good and renewable source of funding, which may be obtained with the assistance of service clubs, such as the Lions and the Kiwanis. The odds are improved if you can demonstrate that, once established, you will generate income, or at least qualify for funding from other sources.

Diversify your funding base, rather than depending on successive grants from a single source. If you become dependent on one source of funding, your project will fail when government priorities change or the source decides arbitrarily that you have drunk from the same well just once too often.

Government departments are staffed by people, and people have enthusiasms. **Cultivate your contacts**, tell them about your work, make them part of your vision. A thank-you note goes a long way. A stamp could be the best investment in your future.

HOW DO I WRITE A SUCCESSFUL PROPOSAL?

- Find the granting body offering the grant that's right for you.
- Persuade them you're the right recipient. Do this by describing your project in terms that fit the grant criteria.
- Get advice from your peers and your professional association, even from a paid consultant, but write the proposal yourself. Your personality and your enthusiasm are part of your project and writing the proposal will ensure these shine through.

Before you need funding

Look for grants

Get details about grant sources from their websites (you can find contact lists in CHRC's Careers in Culture; go to www.culturalhrc.ca, click on Careers in Culture, select a discipline, click on Contacts).

Look at programs, catalogues, the acknowledgement pages of a book, to see where other people working in your artistic or cultural sector have found funding.

Talk to grant administrators and previous grant-selection jury members if possible.

Follow their advice.

Build a reputation

Tell your grant-giving contacts about your current work. Send them invitations to see it.

Get the facts

Assemble hard data about what you do and what it costs, starting with your own tax records and the books for any past projects.

Collect third-party opinions

Keep reviews and articles, whether in print or online. Prepare supporters to talk about you when asked for a reference.

When you need funding

- Start your grant-getting early. A year in advance is none too soon.

- Look close to home first. A major agency is more likely to give you money if smaller bodies have already funded you.
- Get the latest information and forms. Rules and deadlines change.
- Ask yourself:
 - Does the project fit the criteria? Look for funding elsewhere for the part that doesn't fit.
 - Can you meet the deadline? Application deadlines are strictly enforced.
 - Will the grant be in time?
 - Would the money arrive before you start? You won't get funding for something that's already under way.

Applying for funding

Make your application legible, concise, and easy to understand.

Follow the instructions precisely.

Answer every question – if you can't, ask the administrator what you can substitute.

An application is likely to ask for:

Cover letter

A one-page executive summary showing your confidence in the project. Be interesting, be brief, let your enthusiasm shine out...

Introduction

Who are you? What do you do? Who are your clients/audience? What makes you especially deserving?

References

Choose people who are respected in your field and will write passionately about this project. Call them first, as a courtesy and to prime them with information.

Needs assessment

What outside problem will be addressed? What will be the advantages to others?

Objectives

What will the outcome be in measurable terms?

Methods

What precisely will you do? Why is this the best way to achieve your objectives? Why have you turned down the alternatives?

Collaborators

Have their commitment nailed down before you make a part of the formal application.

Evaluation

How will you and the funder know you have succeeded?

Recognition

How will you acknowledge your funding: on programs, publicity, your website?

Future funding

What other sources of funding will cover any next stage?

Budget

The form will lay out what they need. Be realistic: your application will be reviewed by experts. Be cautious: don't rely on the best outcome.

Appendix

This is for information that isn't crucial but may be useful.

After your application

Keep notes

You'll have to report to the funding agency anyway, and if you don't get this grant, you'll do better in future.

Follow up failure

Ask the administrator about successful applications. Compare and contrast.

Stay in touch

Successful or not, thank people for their help. Stay in touch, ask about new and changed programs.

Apply again

If at first you don't succeed, don't abandon hope. Apply again during the next grant round for funding for the same project (if it didn't go ahead at all) or for a new one. Selection juries usually change every round and you may get the right jury for your project.

WHERE ELSE CAN I FIND FINANCIAL SUPPORT?

Governments are not always the best place nor the only place to look for funding. Many sources of government funding have shrunk or disappeared, and other funding sources are so well known that they are oversubscribed. By their nature, formal cultural and artistic programs usually have inflexible criteria that your project might not fit without being bent out of shape.

Luckily, there are other sources – from large foundations to the artist in the next studio – so check them out.

Formal support

To find sources for support for your art, check out the contacts in CHRC's Careers in Culture (go to www.culturalhrc.ca, click on Careers in Culture, select a discipline, click on Contacts). In addition to seeking provincial, territorial and municipal funding, you can search the Internet for arts funding foundations. As well, look in material about other artists' projects for their acknowledgement of support from donors. Examine their publicity material and programs of performances.

Personal support

There are services and money that come to you, rather than to your project.

Love money

Your family or your life partner may provide shelter and occasional gifts or regular support. A centuries-old tradition.

Credit cards

The only organizations that press funding on you. The traditional way to finance independent films. Shop around for the best interest rate: you can pay half again as much for different cards in the same institution. If your income is high enough, you may qualify for a line-of-credit account, accessed through your credit card, with a lower rate of interest. Pay off your "loan" as soon as possible. Interest is a business expense.

Micro-lenders

If your operation looks like a retail store, employs staff, or attracts tourists, you may get a low-interest business loan based on your financial assets, credit worthiness, and the viability of your project.

Government agencies, provincial and municipal arts councils and foundations support local grassroots projects. Search the Internet for information on possible support for a project, and be broad in your search as pockets of support for arts project can be found in unusual places. One unusual search term is “loan circles” (cercles d’emprunt, in Québec) or “credit circles,” which offer business training, planning, and small loans to individuals investing in the establishment of most types of home-based or small-scale businesses.

Local groups

Members of school boards and parent-teacher groups, and of service clubs such as the Lions and Kiwanis, can offer access to unexpected funds. Educational, youth- or immigrant-focused, and local-interest projects might get funding on an ongoing basis.

Your college

Look for endowments or other forms of support, often targeted at a small group or certain individuals for defined purposes.

Professional organization

A source of lists of funding agencies, it may offer direct support, in the form of grants, loans, or scholarships, or through mentoring.

Non-cash support

Cash is always hard to get, but organizations can often make their in-kind services available at low cost or for the publicity value. A brewery may run a beer tent for your Renaissance Fair; your local printer may give you a deal in exchange for an acknowledgement on your website.

If you have cultivated the **person who has the** power to make the decision, the most unlikely sources may materialize. Spread your publicity net wide. (For more information on promoting yourself, refer to Chapter Two.)

Applications

Reread “What government programs can help me,” and “How do I write a successful proposal”, and go through the same careful preparation when you apply for loans and scholarships, cash, or free services. Remember:

- Start early.
- Pick the best source.
- Present yourself as an enthusiastic proponent for a project that fits the source’s criteria.
- Get the application details right, whether it’s filling in a form or knowing when the local business person will be most receptive.

Support each other

Canadian culture’s biggest source of funding is its practitioners. We’re all in the same boat, and we should row together.

Six photographers can rent and equip a state-of-the-art lab. Five carvers can rent a truck and drive around farms looking for seasoned wood. Four actors can form a co-op and mount a production.

We are each other’s best resources. We know the facts, we have the contacts and experience, we can offer help even before we’re asked. It’s a great feeling for all involved.

HOW CAN I GET GOOD PROFESSIONAL SERVICES AT THE BEST PRICE?

There's no point in going to a famous lawyer, like Eddie Greenspan, because your life partner isn't sharing the grocery bills. You may need a counsellor, but first just try to talk things through. Paying a professional won't make your problem disappear, although an expert can help you reach your best solution.

Know what you need

Break down your situation into five or six main facts.

Write down what you want in a sentence. If you can't, you haven't thought it through.

Know your budget

If you can't afford a certified professional, there are alternatives.

- Provincial Law Societies often have recorded legal advice lines and Legal Aid clinics.
- A paralegal can handle form-filing.
- An uncertified tax preparer may be just what you need to do your return.
- Professional associations often run seminars, or offer help with contracts, tax, and dispute resolution.
- Do research online and at your local library.

Quality of service is a risk with out-of-the-mainstream solutions. Certified professionals are governed by their association's rules, and their higher fees help guard you against fraud and incompetence.

Choose your professional

Make a list

- Ask your professional association for recommendations.
- The association that represents the professional you need.
- People who have solved identical problems, or even look for recommendations online. You'll need three or four well-recommended choices – more, if you're relying only on anonymous online recommendations.

Call around

- Call up each candidate and read them the outline of your situation.
- Make notes as they reply.
- You want someone who understands what you are talking about, and who treats your problem as interesting, but something they solve as part of their regular business. Do not hire an insurance claim lawyer to deal with an entertainment or copyright issue.
- Remember: *you* pay for *their* research.

Compare and contrast

Make a shortlist from your notes and set up appointments to discuss engaging those professionals. The best prospect will recognize your problem, give you a likely outcome based on his experience, and quote you at least a ballpark figure of your costs.

Do not hesitate to ask about his fees. (For more information on finding professional services and negotiating for their services, see Chapter Five.)

Make your choice

Go with your instincts.

Given basic competence, choose the person you like best.

Different strokes ...

Bookkeepers and office administration services can work very efficiently. You could do the work, but they may save you time.

Galleries and Agencies provide access to clients. You can be a musician without an agent, or a visual artist without a gallery, but your opportunities may be reduced. These professionals may have a self-regulating organization: many talent agents belong to the Talent Agents and Managers Association of Canada, while art dealers have the Professional Art Dealers Association of Canada. The organization will generally give you referrals from its membership list, details on acceptable business practices, and a range of approved fees and commissions.

Accountants, tax preparers, and business managers may be essential if your finances are complex, or your income is high. Even if you use a professional, understand your own affairs:

your tax return is your own responsibility, and no financial advisor can guarantee the avoidance of, or the subsequent successful conclusion of an audit. (For more information on dealing with financial advisors, see Chapter Four.) Go to the office of professional help with everything clearly organized on paper. Don't forget: they charge by the minute.

Insurance brokers, financial advisers, and bank staff are salespeople. Their products may be what you need, but you will seldom be told about competitors' products. Ask about front end and/or back end loads, and the exact nature of their fee structure. In the case of percentages, ask percentages of what? Get it in writing.

Some specifics:

- The Insurance Brokers Association of Canada will help you find a broker.
- Your financial advisor advises. Only you can decide if an investment's profit outweighs the risks and actually saves you money after the fees are paid.
- Different banks, trust companies, and credit unions have various fee structures.
- Different branch managers may be either more or less sympathetic to your needs.
- Don't hand your problem to the first professional you find online. "AAAAA Loans for U" may not be the solution.

In summary:

- Understand your problem and define it.
- Will a professional help?
- Make a list, and shortlist the competent individuals or firms.
- Go with your gut instinct.

HOW DO I ASSESS A PROJECT EFFECTIVELY?

Writing a book, making a film, mounting an exhibit, cutting a record, or producing a show. Responding to a job advertisement, entering a competition, or applying for a grant. Whether you're taking on someone else's project, or defining your own, good planning will save you time and energy. It may make the difference between success and failure.

You'll get to the section on preparing The Action Plan soon, but first decide if the project is right for you, right now. You have four questions to answer:

1. What is it? **Define the project**
2. What will I gain? **Look for your advantages**
3. What will it cost? **Measure all the disadvantages**
4. Do I have time? **Scheduling**

Define the project

A project may be your own idea, or a commission or opportunity defined by someone else.

Someone else's project

The name is not the definition. The theatre board may not **really** want an "innovative" artistic director if they're offering only a one-year contract.

Look carefully at what they tell you, but also try to hear what they're *not* saying. The first part of your project is persuading them to consider you. What are they expecting to see in an application or a proposal, or hear during an oral presentation? You can get advice on the written and unwritten rules from your professional network, your association, or from a professional service organization.

Your own project

Step back for a moment. What attracts you to this particular idea? What will it gain you? There may be a better way to achieve your *real* goals. That's your real project. Changing your project now is easier than waiting until you have invested time and money in the old version.

If you do change your mind as the project goes ahead, treat each change of direction as a new project. Stay focused and always keep your eye on the target. If you don't know where you're headed, how will you know when you've arrived?

Look for your advantages

What do you want to gain from the project? There may be many possible benefits, but which is most important?

How does this affect your overall career goals?

Reputation

Learned skills

Artistic development

Hard cash

Recognition

Chemistry between yourself and others involved in the project

What you want will affect your decisions in planning. If you are building a reputation, it may be worth while being an unpaid intern in a well-known workshop. If you need cash right now, that project would be a poor choice. Does the project itself pay you, like a writing commission, or will it be a tool for attracting money in the future, like cutting a demo?

Measure the disadvantages

What will you lose by doing the project?

Reputation: Is it worth a hefty fee to be the corporate voice for Sewage Appreciation?

Artistic Development: How much work will you do on the Great Canadian Novel while you are co-writing an animated series for hand-held devices?

Money: Deal with the cash-flow details later; this is just the big picture. Can you afford to take time away from your set design job to launch that play on this summer's Fringe theatre circuit?

Scheduling

When should it start? How long will it take? When must it be finished?

What else are you doing in this time slot?

If you can't do it now, what must change to make it possible in the future? Should you start planning earlier next year? Do more preliminary work ahead of time? Earn money now to buy time for this project later?

Don't rush the four preliminaries:

- The definition.
- Your benefit.
- Your cost.
- The time factors.

If the project still interests you, talk about it. An outside eye, expert or not, will give you a whole new perspective.

If you can't explain the project, perhaps your understanding of it is still unclear.

If you're concentrating on the big idea, perhaps you've missed the obvious problem: your working model of a giant Blackberry in ice may be a fascinating idea, but the timing might not be right if it is to be shown at a summer festival.

At this stage, try to look at everything, but don't get bogged down in details. Time enough for that when you're sure this project is worth doing.

Don't be afraid to abandon a project that will prove too troublesome or costly.

HOW DO I DEVELOP AN ACTION PLAN?

If you want to try the project, an action plan tells you how you can succeed. An action plan lays out what has to happen and when, what you've got, and what you need. It differs fundamentally from your business plan. A business plan is a strategic map setting out your overall goals. An action plan presents an operational map related exclusively to one project.

A photographer collects interesting shots for stock photo agencies while on assignments to exotic locations or on vacation. In five years, she has built a clientele of specialty magazines, and her stock photographs provide an increasing income. A magazine shoot for a Swiss hotel is a fairly standard project for her, but she still needs an action plan.

Look at your Project Assessment – what will your advantage be? Most projects serve more than one purpose, but if you're mainly after cash, you'll use a different approach than if you want to build your reputation.

Look for the logical sections of the project, then look at each section. Be methodical; work through each section in detail. Be thorough; don't skip elements because it seems obvious. Look at each section to be sure it really is as standard as you thought.

Starting

After the first decision (making the commitment), each step in the project will depend on the one before. Be realistic about scheduling: don't count on everything working out on time. Build in some room to manoeuvre.

Finishing

Imposed deadlines are only part of the story. You will probably have to combine parts of the project with other commitments: artistic, personal, or drudge work. Some sections will allow overlapping more easily than others.

Skills and materials needed

You are unlikely to have all the skills, tools, and resources you need.

Should you acquire them? Work around them? Or ask for help?

People needed

You may have the skills you need, but do you have the time? Do you want to hire the skills, or take on partners to share in the creation? Could you run a group? Is administration going to frustrate you? Could you delegate those tasks? Will the chemistry of the people you hire adversely or positively affect your project?

What the co-workers will need

Some will take a share of the profits and/or royalties; some will need cash. Some need publicity, so your contract will have to allow for their separate credit. Some want creative input, which may slow the project down.

Cashflow

What will this section cost? If you're relying on money coming in, what are the guarantees of that money coming? When does it arrive?

Can you afford to begin? Can you pay your helpers, or will they wait until the cash arrives? Will you be able to afford to finish? And eat as well?

This is not a linear process; you'll go round and round, adding details and removing obstacles.

Our photographer knows that technically she can handle the job, it's a familiar type of assignment, and the suggested fee is normal. Should I be pushing for a higher rate? She checks the magazine's travel dates. Yes, they fit with the next bookings and there's time to do the lab work before I'm off again. The details of the shoot will be organized for her, but she should make sure to get some slack. There are plenty of mountains in photo libraries, but cuckoo clocks and high tech might be an angle. Is there someone at the studio who has computer contacts? I could give them an honorarium; the fee from the last job finally came through. More checking to do; looks okay so far.

When you have divided the project into a series of single actions, you can use this sort of layout to help your planning. Then, in a simplified form, use it as a reminder of the structure of your project. Note that the Resources column can be divided into two columns: one for personnel and one for other resources. This may be required if you are engaged in a project that involves a lot of other people, such as mounting a stage production or a music festival.

ACTION PLAN

Use this guide to develop your next action plan

Actions	Resources	Budget		Timeline		Remarks
		Projected	Actual	Projected	Actual	

Actions

What has to be done in this phase of the project?

Resources

What is needed for the success of this phase? This may be a skill, personnel, a service, raw material, etc.

Budget

What will this phase cost? What money is coming in? Beware of delays to grants, advances, etc.

Timeline

When does this phase have to be finished? This may be an outside deadline, or part of your scheduling later phases.

Remarks

What other information is useful? Use this space also for your evaluations as the project goes on and afterwards.

ACTION PLAN EXAMPLE

Actions	Resources	Budget		Timeline		Remarks
		Projected	Actual	Projected	Actual	
1. Prepare equipment and supplies	Photo gear fine, but need telephoto	\$625	\$565	June 5	June 11	Always ask for discount. Worked this time.
2. Make travel & accommodation arrangements	Travel, agent and destination website	\$1,000 (Air) \$625 (B&B)	\$1100 \$530	Book by May 31 Seat sale.	May 28	Don't forget taxes and airport fees next time! Canadian \$ stronger better rates on B&B
3. Establish contacts	Travel, bureau, location, reps.	Free services?	Yes	Contact by May 15 latest	May 14	Complimentary accommodation possible through this contact
4. Sell shots	Travel mag, hi-tech mag (on spec)	\$625 \$1,250	\$3,75 \$565	July 5 July 15	July 10 July 30	Extra for website use negotiated. Foot in the door, but is there \$\$\$ here?

Checklist

- As you plan, ideas about other sections or other projects will occur to you. Carry your notebook. Don't lose the thread.
- Look at the whole picture again as each new answer provokes more questions. Don't get bogged down in the details.
- Tell yourself the truth. Don't be too proud to realize that the idea that looked so great has turned out to be a monster. Abandon the project if that's the best course of action.
- Talk your action plan over with a mentor, with your collaborators, with your client. Can you run a mini-project to try it out?
- You can never be quite sure your plan will work. Eventually, you'll have to make a leap of faith. Or not.
- No action plan fully matches reality. If it's your project and the details change as things go on, don't be afraid to revise the plan. If it's their plan, keep your client up to date in case your contract needs changing. If the client changes the specifications, what about the resulting costs?

HOW DO I USE THE ACTION PLAN DURING THE PROJECT?

Once the project starts, real life rears its ugly head. Nothing will go exactly according to plan. If the project is well structured, the anticipated profits can survive the worst of disasters provided you are tracking their development, allowing you to adjust the plan in time to fit the new reality.

You are bound to forget and misjudge things. Planning and tracking in detail lessens the likelihood that unforeseen events will sabotage your project.

If your plan is sufficiently detailed, changes within any action can be dealt with and their impact contained, with minimal bad effect on the rest of the project. However, if you have a coarse-grained action plan, which breaks the project into large chunks, any change will be well advanced before you catch it.

Look at our photographer's Action Plan. Without setting herself deadlines, she might have missed advice on the computer tie-in because of her friend Miriam's holiday. If she hadn't checked on the visa situation in good time, everyone else may have assumed she'd done it, and she may be denied access at a border.

Tracking her progress through the plan as she goes, she can see if there's another supplier of special lenses, filter, or film when Gene's is out of stock. She has time to track down her old apartment sitter, who moved out on her boyfriend. And she will talk to Susi the writer before the contract negotiations, and find out that she wants underwater mountain stream shots

At the end of each action, before you evaluate it (see the next section), make sure it really is finished. Have you got the film stock, or has it just been promised "in plenty of time?" Do you need to look for another source, or is Gene's reliable enough to trust? Should you set another deadline, to check up on them? Don't rely on the availability of materials while on location without checking with reliable sources.

Planning and then checking the plans may sound like overkill, but it's not. There is no need for irrational apprehension, but you can be fairly sure the one thing you assumed would be all right, won't be. Murphy's Law never sleeps.

Use the Action Plan template on page 82.

Make sure that a projection (**sub-column Projected**) for each **Action** listed in the Action Plan is made – as appropriate – in terms of **Budget**, and **Timeline**).

At regular intervals or whenever an Action is completed during the project, fill out the sub-column **Actual** to identify the *actual* “performance” of the project in terms of **costs**, **income**, and **deadlines**.

Identify the cause(s) of any **gap** between projections and actuals (use **Remarks** column to note the conclusion of your analysis).

If required, decide on corrective measures and modify the Action Plan accordingly.

HOW DO I EVALUATE A COMPLETED PROJECT?

“The unexamined life is not worth living.” – *Socrates*

After a project has been completed, set your feelings aside and look at it systematically. Evaluation is not the same as wallowing in anticipated glory, or in self-pity. Ask yourself some questions. Tell yourself the truth. Which decisions would you have changed? Were they in the planning, or in the project itself? Write out your conclusions so you’ll remember them. If it was an outside project, get your clients’ views, from whatever evidence is available. You might try asking them. Use the same headings as your Project assessment:

Formal aim – Your personal project ...

QUESTIONS	YES or NO	COMMENTS
Did you achieve your aim?		
Did you change it?		
Should you have?		
Did you plan the change, or did it just happen?		
Did you realize that you had changed it? What did you do then?		

Formal aim – Someone else’s project

QUESTIONS	YES or NO	COMMENTS
Did you achieve the aim as described?		
If not, was that because their aim had changed?		
Were you given a real chance at the new aim?		

What did I gain?

QUESTIONS	YES or NO	COMMENTS
Did they sign off and pay you?		
Will they hire you again?		
What feedback did you get?		
Did you explicitly ask for feedback?		
Did they say they were pleased?		
Did they think their objectives had been achieved?		
Reputation		
Are new doors opening to you?		
Have you been recommended for more ambitious projects?		
Did they certify you? How useful has that been?		
Are you more hireable, or less?		
Learned Skills		
With or without a formal qualification, did you gain a skill?		
Was it what you set out to learn?		
Artistic Development		
Can you identify a change? Was it the change you planned for?		
Have you become a better artist?		
Is your focus clearer, or more confused?		
Money		
Did you make more or less profit than you thought?		
In either case, were the profit estimates wrong?		
Would a better set-up or tighter ongoing control improve things?		

Did they cover extra expenses they forced on you?		
Did you get paid in full and on time?		
Did your contract make allowances for these eventualities?		

What did it cost?

QUESTIONS	YES or NO	COMMENTS
Reputation Did any failures on your part, either real or construed, hurt it?		
Will these problems affect your future work?		
Artistic Development Have you changed your view of such projects or clients?		
Did they use your input, or treat you like a Great Artist slumming?		
Money Did you lose less or more than expected?		
Were the project costs wrong?		
Were they sympathetic – did they try to minimize your costs?		
If you lost more than expected, can you catch up now?		

Scheduling

QUESTIONS	YES or NO	COMMENTS
Were the deadlines set in stone?		
Were you in danger of losing the commission or future ones?		
If you finished ahead of time, was this welcomed or questioned?		

After you have worked through an evaluation, take it to a mentor, someone whose opinion you trust. Beware of benevolent lies people may tell you what they think you want to hear rather than the truth. Listen for what they don't want to talk about.

Nothing is all good or all bad. Your worst experience may have taught you one essential skill, or given you one vital contact.

Go back over your notes of old projects: see if your new perspective has changed your old conclusions.

This whole exercise will have been wasted if you don't learn from your mistakes and change what you do. You must learn to avoid some of your favourite traps.