



CAKI HÅNDBOG

A handbook for students
in the art schools

IDEA DEVELOPMENT & PROJECT MANAGEMENT

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FONDEN FOR ENTREPRENØRSKAB
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CAKI Handbook

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Idea Development

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Voilà

Take control

As an artist and creative you are probably earning your income from creating and realizing projects.

The projects can be of varying size, they can be your own or they can be part of projects by others. Likewise your practice can be as self-employed, employed by others or as freelancer.

To work project based is part of the working conditions for many artists and creatives. Therefore it is relevant that you learn how to carry your project all the way through.

At CAKI we often experience that project management is something, which can cause many problems. How to develop a realistic budget? What about collaborators, goals, permissions and organisation of the team?

If you don't have the necessary knowledge or the relevant tools, such challenges can swipe you off your feet.

This handbook provides you with the knowledge you will need to take control of your project using a professional approach.

It is important to underline that the book is not a fact list of how you develop your project step by step. Rather it is meant to be an inspirational guide. Take what you can use, discard and add where it makes sense for you, your project and your artistic practice.

Happy reading!

Structure of the book

In this book, we guide you in how to turn your artistic or creative idea into a realizable project. You will get practical knowledge and ready-to-use tools that can help you develop and qualify your idea.

Some of the exercises are individual, others are for groups.

The contents are organized in three parts:

Part 1. Idea development

The first part is about how you find the idea, which will be the core of the project. You will be presented for the four phases of the idea development with hands on exercises for each phase.

Part 2: Project management

The second part of the book takes you through the seven phases of the project. You will get knowledge, advice and exercises that can help you think through all parts of the project, before you finally sum up the project in a thought through and well formulated project description.

Part 3: Evaluation

The lights are out and the audience is gone, but the project is not quite over yet. Now awaits the evaluation and final report, which we will help you get through in this third part of the book.



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PART 1

IDEA DEVELOPMENT

P:PY

EW

RETURN HERE OR SEND TO
BOOKSHELF - DESIGN
WORKSTATION 101



A TIMBER 10
02 DRY GRADED
CE T11NSTA 102



ESTABLISHED 1911
100 YEARS OF DESIGN

Developing the good idea

Good ideas seldom appear out of nowhere. In most cases, both time and hard work lay the foundation for the development of a good idea.

There are countless idea development exercises and tools available. The one thing they all have in common is the goal of pushing you out of your comfort zone, breaking your familiar framework and leading you in alternative, unconventional directions, because good ideas often hide in unexpected places.

Three tips for developing ideas

Be open

Idea development requires an open mind. You must listen and be open to the ideas, views and perspectives of others - even when you think your idea is perfect as it is. If you have an open mind, the idea can move and develop in ways you may not have expected. This can often benefit your project.

Involve Others

Idea development thrives in an environment where people from different backgrounds are present. Develop ideas in groups, preferably ones containing people from different professions, cultures and age groups. You can also invite outsiders into the idea development process to help you see things from a different angle.

Seek Inspiration

It's not just something people say. Getting away from your familiar environment and distractions can help you find inspiration. Go for a walk at the Zoo, attend a lecture or visit your old school. It can also be a good idea to seek out others who make projects like yours and gain inspiration from watching them in action.

Focus the Group

Before you begin developing an idea in a group, it's important that everyone involved understand the direction of the process you are about to begin.

Structure the creative process by asking the group a specific and open-focus question.

The focus question is not simple yes or no questions, but rather broad what/where question that address goals in an idea's development:

These can include questions like:

- How do we put on a performance that sparks a debate about the conditions and legitimacy of democracy?
- How do we create a production that presents one of Goethe's poems in a modern and up-to-date interpretation?
- How do we create an outdoor lighting solution in Fælledparken that makes visitors feel safe?

The four phases

Generally, idea development happens in phases where you alternate between opening and closing the creative process.

The four phases are:

Creating - Evaluating - Improving - Describing

It is important to differentiate the processes and maintain awareness of which phase you are in and which approach it requires. You have to think creatively, practically and critically at different points in the process.

In the creating phase, you should not criticize, question or rationalize your idea. If you are too orientated towards order or result too early in the process, you will limit the creative process. This will reduce your chances of having a new idea, and you will probably end up with the same kind of ideas you usually have.

On the other hand, if you are too open and chaotic in all the phases, you may generate a high amount of ideas, but they will be difficult to realize. Your ideas will seem flighty and unprocessed unless you are critical and result-oriented about whether or not your ideas are durable and realizable.

Read more about the four phases on the following pages and find exercises for each phase.

Creating

Creating ideas requires freedom to think in new ways. The creating process is the time to investigate, wonder and let your thoughts flow freely.

Be open to saying yes, and welcome ideas from others - including the ones that represent viewpoints different from yours or that you might find silly or unrealistic. Nothing ruins the creative process like an idea killer who rejects or nitpicks others' ideas.

Remember chaos is ok - you can organize the ideas later.

Exercises for the creating phase

Exercise: Brainstorm

Brainstorming is one of the most well-known methods of idea development. The method is especially useful in the creating phase because it promotes the creative flow of thought.

How to brainstorm:

1. Start with a focus question.
2. Set a time limit for the brainstorm. It can be one long period or several short sessions.
3. Even though brainstorming is unstructured, set clear guidelines for the process before you start. These can include:
 - All criticism is forbidden
 - All ideas are welcome
 - The more ideas, the better
 - Combining multiple ideas is encouraged
 - Ideas do not necessarily have to be realistic
4. Write ideas down on little pieces of paper
5. When the brainstorm is over, organize the pieces of paper into categories. Some may be about an idea's form, others about content, target audience or activities.

Organizing the notes by type can help shed new light on each category. This is a good starting point for further work, for example evaluating and improving the idea.

Exercise: Brainwriting

Brainwriting is another method that is suited to the creative process. The method is an anonymous version of brainstorming and addresses several ideas at a time.

How to brainwrite:

1. The group is asked a focus question
2. Each person writes their answer anonymously
3. The ideas are collected in a pile
4. Each person takes an idea from the pile and has the following options;
 - Using the idea to generate another idea, which is written down and sent along.
 - Continuing to write about and develop or change the idea before sending it along.
5. The ideas are collected and sent along, and step 4 is repeated until you run out of time or ideas.
6. Everything is collected and evaluated.

Evaluating

When you evaluate an idea, you are stepping into a new phase where you pick up the pieces, answer questions and make decisions.

This phase is about viewing the ideas soberly, analytically and objectively as well as addressing how the idea can be realized. This means that it is time for practical, future-oriented thinking.

Exercises for the evaluation phase

Exercise: Test the idea

The first elimination of ideas happens in the evaluation phase. Be critical and evaluate and select which ideas are worth working with.

How to do it:

1. Ask four questions about each idea:
 - How would this idea be realized?
 - What is possible?
 - What works?
 - What doesn't work?

Exercise: The Six Thinking Hats

The method of the *Six Thinking Hats* is a method to help focus attention and criticism toward a specific direction so the idea is covered from all angles.

- White = facts and information
 - Yellow = advantages
 - Black = dangers and problems
 - Green = new ideas
 - Red = feelings and intuition
 - Blue = process
1. Each person is assigned a color. The color should be visible to everyone (for example on a piece of paper). The person must now think only about the areas indicated by that color.
 2. Everyone takes turns presenting their concerns and considerations. The person who starts with blue determines the order.
 3. Switch colors and repeat until you have been through all the colors (if there are fewer than six people) or until everyone has had every color.

Improving

When you have selected the idea(s) you want to work with, it is time to return to the open creative process to further develop the idea. Now that you have a more specific starting point, be ready to let your thoughts flow freely again.

Even though you have found some good ideas to start with, it's too early to lock yourself into the finished idea. The idea needs to be thought out and sharpened: Who will be part of challenging it? What are the criteria for success? Who should the target audience be? How will the idea be conveyed and possibly marketed? You might improve the idea by combining two different ideas or finding an atypical method for realizing it. Be ready to let go in case a new and better idea turns up.

In other words: Kill your darlings!

Exercises for the Improvement Phase

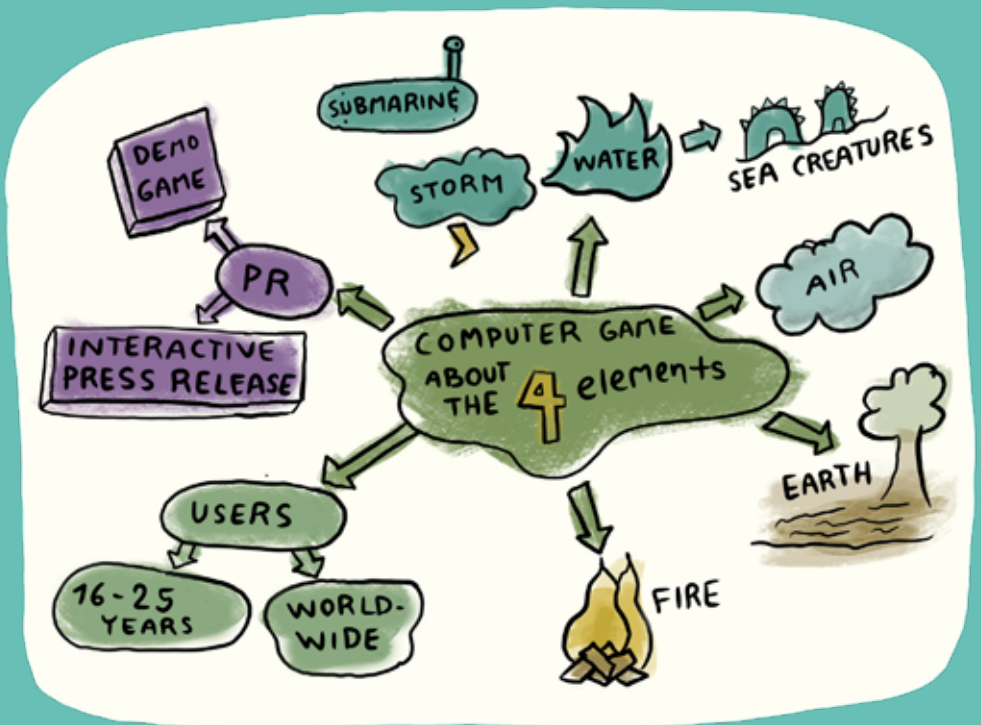
Exercise: Mind Map

A mind map paints a picture of an idea's facets and their internal connections. A mind map can make it easier for you to structure an idea.

How to:

1. Write the idea in the middle of a piece of paper.
2. Write down every aspect of the idea that comes to mind, and connect the items to each other and to the idea through general categories such as artistic expression, communication, inspiration, target audience, etc.

Example of a small Mind Map



Exercises for the Improvement Phase

The Astronaut Method

An alternative way to evaluate and improve your idea is to use the Astronaut Method. In this method, you expose your idea to extreme external effects, forcing you to see both the possibilities and limitations of the idea.

How to:

Ask yourself extreme questions such as:

- How would the idea look as a worldwide movement?
- How would the idea look in a miniature version?
- How would the idea be if it were a massive failure?
- What is the idea's opposite?

Describe

Once again it is time to close the process and focus on how you can transform your chosen idea into reality.

This is when you must be specific and practical and consider the idea in detail: How can it be challenged? Which method will we use? What will the idea cost? Who will challenge it?

Face any final doubts and write a detailed description of the idea. This way you have a clear and thorough path to follow, and if you work in a group, all members are on the same page about the work that is to come.

Exercises for the Descriptive Phase

Exercise: Visualize the idea – go to the movies

The movie method helps you picture the idea and describe it as it would appear in a movie.

In a group, the movie method helps everyone understand how each person imagines the idea's final expression.

How to:

1. Everyone closes their eyes and imagines the idea playing in front of them as a movie.
2. Now take turns using illustrative words to describe the idea and explaining what you see.
3. Describe how the audience arrives at the event, how they behave, and what they experience. Describe how the room looks.
4. Engage the senses: Describe colors, atmosphere, temperature - is it hot or cold?

Exercise: The final questions

Make sure the idea has been tried, challenged, developed and improved as much as possible. Ask the final follow-up questions to finish developing the idea and assure its quality:

WHO

Who wants the idea? Who is it for? Who is involved? Who will the idea benefit? Who will it exclude?

WHAT

What will happen? What needs to be done? What can go wrong? What works and what doesn't?

WHEN

When will it happen? How does it fit into the timeline of other events? Can it be postponed?

WHERE

Where will it happen? What would be the best place? If it can't be there, where can it be instead? How does the place affect the idea? How does the execution of the idea affect the place?

HOW

How does it happen? How do we get from beginning to end? What kind of work or process will we use to execute the idea?

WHY

Why will it happen? Why do exactly this and not something else? Why this exact order, place and audience?

CONTEXT

How does the idea fit into current developments in society, the times, trends, and local community?



PART 2

PROJECT MANAGEMENT



From idea to project

The project description is the plan for how an idea is realized. It is the alpha and omega of every successful project, because it is used to formulate the project's criteria of success and milestones, and to align expectations in the group and among collaborators (if relevant for your project). The product description is also necessary when applying for funding to make the project a reality.

Phases of the project

The project description must consider all phases of the project.

These are:

1. Objective and goal-setting
2. Process and planning
3. Stakeholders
4. Strengths and weaknesses
5. Organization and collaboration
6. PR and communication
7. Finances and budget

The seven phases are covered one by one on the following pages.

Read about the different phases in any order that suits you and your process.

Objective and goal-setting

A project can be simultaneously beautiful, ugly, repulsive and thought-provoking – but it always has an objective.

The objective, or vision, is the core of the project. It is what you want to achieve through your project – the state you wish to create.

The objective addresses why the project is relevant, interesting and meaningful. It can arise from a need, a lack, or a dissatisfaction with the state of something, or from a desire to touch, affect or entertain others.

It is important to clarify the objective early in the process, and perhaps you have already summarized it in the project's idea phase. Now it is time to define the objective clearly and precisely, since it is the objective that will dictate the project's processes, activities and tasks.

A good objective is ambitious, clear and realistic. The objective is not simply a formality or a box to be checked, nor should it be too abstract or too far out of reach. Objectives such as „saving the rainforest" or "bringing about world peace," while honorable ambitions, are not realistically achievable within an artistic project.

Examples of artistic objectives

- Starting a debate about inequality in society
- Questioning the way we process artistic theories
- Creating a lighting design that makes citizens feel safe

Goals and success criteria

The project's vision does not stand alone, but is supplemented by a series of sub-goals which show exactly how you will realize your objective.

The goals should be so specific that you can check them off a list. In other words, they should be **SMART**:

Specific

Measurable

Attainable (but ambitious)

Relevant

Time-Based

Using the sub-goals as a background, you can now set up your criteria for success. The criteria are the factors that show whether or not your project has achieved its objective.

The criteria can be factors such as the size of the audience, the amount of publicity or the desired turnover. If the goal is to have a wide reach, the criteria for success could include being on the cover of a daily newspaper or on the evening news.

Exercise: Finding the project objective

Be sure your idea is as tried, challenged, developed and prepared as possible. Ask final follow-up questions to complete and assure the quality of the idea.

1. You or all the members of the project group come up with objectives and write them down on small pieces of paper.
2. Organize the objectives so that the ones dealing with the most general goals/ concepts are at the top, while the ones dealing with more specific goals or activities (sub-goals) are at the bottom.
3. Test the top objective(s) by asking „Why?“

For example: Why should we create a lighting design that makes park visitors feel safe? To be sure visitors will use the park in the winter.

Why should we be sure that visitors use the park in the winter? To ensure our citizens stay healthy and active year round.

4. If a new, more general goal is found in the pile, place it at the top.
5. The exercise is over when you can no longer answer the question of "why," or when the answers become so abstract that they are beyond the scope of the project.
6. Write down the general goals. If you are a project group, do it together so that everyone agrees on the general goal of the project.

Process and planning

When you have defined the objective and vision, ask yourself what is required to reach them – and further, when you must reach them.

With this as the starting point, you may begin planning the project.

All the project's activities – small and large, are written in the project plan.

In the activities plan, you also note the project's milestones. Milestones are the activities that are of particular importance and that other parts of the project depend on.

Uncertainty along the way is normal

Even if you have set a series of realistic goals, you cannot predict whether or not the project will unfold according to plan. Projects are often characterized by an ongoing development and have many unknown factors. Therefore it is completely natural that you may have to adapt, change or give up some activities along the way.

Be prepared to revise goals, deadlines and other aspects of the project.

Of course this does not mean that you must give up on your vision and goal if the plans change or as soon as you encounter obstacles! Simply be open to influences from the outside world.

Practice thinking of alternative and creative solutions when you encounter limitations – the alternative solution is not always the lesser solution.

Exercise: Make a project plan

1. List all activities in one column
2. List the names of who is responsible for the activity in another column
3. Note the process and activity deadline in an overview
4. Mark milestones in red

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Responsible
Idea Development											Morten
Research											Julie
Presentation for partners			15/3								Julie and Morten
Make budgets											Julie
Fundraising											Julie
Artistic development											Julie and Morten
Workshop and presentation							3/6				Morten
Media contact											Julie
Closing									8/10		All
Evaluation											All

Stakeholders

In order for your project to gain visibility, it must be directed toward someone.

The recipient your project is primarily directed toward is called the target group. This can be an audience, a customer, a professional group, a teacher, a producer, the head of a company, children ages 5 to 7, and so on.

Your project may also be of interest to many others outside the target group. For example, it could be of interest to an educational institution, a foundation, the media, or parents of children ages 5 to 7.

All parties who are interested in your project, who can be influenced by it, or who can have influence on the project's end result are called stakeholders.

A stakeholder analysis helps you in the development of the project. You become aware of who the project's stakeholders are and how they can or must become involved.

The analysis helps you determine what to say to whom to create interest – and helps you plan activities, communication tasks, etc.

The stakeholder analysis is useful to have at hand throughout the project process, including during the internal distribution of tasks among members of the project team. When you understand their expectations and can consider both your own needs and their potential needs, you will also be better prepared to avoid conflicts.

Exercise: Stakeholder Analysis

Conduct a stakeholder analysis to gain an overview of all the project's stakeholders – including those you do not currently find relevant.

1. List all the stakeholders you can think of. Include both internal and external collaborators as well as those who are not necessarily involved in the project, such as the media, competitors, the municipality, police or other authorities from whom you need permission to realize your project.
2. Ask the following questions about each stakeholder:
 - What interest does the stakeholder have in the project?
 - What are the stakeholder's criteria for success for the project?
 - How will the stakeholder contribute?
 - What can the project use the stakeholder for?
 - What can the project do for the stakeholder?
 - What advantages does the project give the stakeholder?
 - What are the project's downsides for the stakeholder?
3. Make a chart to give you an overview of the stakeholders.
4. Arrange stakeholders in logical sections, for example based on their interest in the project, their expected actions or their opinions.

Example of a stakeholder analysis for a children's theatre production

Stakeholder	Stakeholder's interest in project	How do you hope the stakeholder will contribute?	The project's action toward the stakeholder
School children ages 3-6	An exciting experience	Attend the production and be attentive	Their needs are central and must be heard. Invite to dress rehearsal and ask for feedback. Send invitation to premiere. Create good environment for children.
Teachers	An exciting experience. Break from teaching. Alternative approach to learning.	Advertize production and bring children along.	Include early, and ask about their experience with children's theatre. Make sure they relay information to children and parents in a timely fashion
Parents	An exciting experience for their children.	Give children permission and support.	No direct action. But be aware that their support is important, and listen to them if they have something to say.
Musicians	Creative challenge: Contribute artistically	Contribute to an excellent production. Collaborate with other artists	Align expectations. Musicians must adapt to playwright. Set clear boundaries from the beginning to avoid conflict between artists.
Municipality	Good initiative for Copenhagen children	Funding of project + network + PR	Not involved in content: Make clear from the beginning. Reach agreement about process early.
Media	Interesting story: New approach to children's theatre	Publicize project: Before and after performance	Contact media early with good, angled stories – good PR materials, photos, etc.

Exercise 2: Prioritization of stakeholders

Stakeholder analysis usually generates many stakeholders. You cannot target all of them equally; you must select and prioritize.

How to do it:

1. Prioritize stakeholders according to their influence and interest in the project by placing them on the chart below.

INFLUENCE	Address needs Keep satisfied	Keep closely engaged and actively involved
	Minimal communication Monitor	Keep informed Show respect
	INTEREST	

2. Focus project, time and energy on stakeholders with the largest influence and interest. Always monitor the other stakeholders. They may end up having influence later in the process.

Strengths and weaknesses

A good project manager knows the strengths and weaknesses of the project and therefore knows where extra work needs to be done to reach the goal.

A SWOT analysis is a useful tool for summarizing strengths and weaknesses in a project.

SWOT is an English acronym which stands for:

Strengths

Weaknesses

Opportunities

Threats

The first two factors – strengths and weaknesses– concern the internal circumstances of the project. This means the circumstances within the organization that executes the project.

The last two factors – opportunities and threats – concern external circumstances. This means the world outside the project.

By conducting a SWOT analysis, you can predict problems and create a plan of action for the activities you must put in motion as well, as the ones you must adjust in order to address or avoid conflict.

Typical weaknesses in (artistic) projects

- An unsatisfactory activity plan: The plan is not cohesive, for example because it is incomplete or too optimistic regarding time frame.
- Finances: Budget is incomplete or missing good overview of project's finances, coming expenses or billing procedure.
- Visibility: Communication deprioritized in favor of other practical tasks. This results in insufficient coverage of the project which can have influence on the project's success, finances, etc.

Typical threats to an artistic project

- Finances: For many artistic projects, being unable to obtain funding to realize the project is a significant threat. Take fundraising tasks seriously, and start early.
- Permission and rights: Be sure to obtain permission from the municipality, government, police, etc. Also obtain rights to use music, manuscripts, images etc. which others hold the rights to.
- Opposition: Art can provoke, so it is not surprising that artistic projects sometimes encounter opposition. Be sure to monitor potentially opposing critics and have a plan of how you will – or will not – engage them in dialogue.

Exercise 2: Prioritization of stakeholders

Conduct a SWOT analysis to become aware of the parts of the project which must be strengthened in order to reach the goal.

1. Fill out the chart. Begin the SWOT analysis with a short brainstorm.
2. Consider if any of the project's weaknesses can be turned into strengths by addressing them a certain way.

INTERNAL	<p>STRENGTHS Where are we strong?</p> <p>For example professional knowledge, personal characteristics, good contacts, strong concept, experience, good finances, etc.</p>	<p>WEAKNESSES Where are we weak?</p> <p>For example too little professional knowledge, personal characteristics, few good contacts, weak concept, lacking experience, poor budget etc.</p>
EXTERNAL	<p>OPPORTUNITIES Positive circumstances in the outside world?</p> <p>For example new technology, political interest, timing, trends, language, popularity, media, network, location, customers, suppliers</p>	<p>THREATS Negative circumstances in the outside world?</p> <p>For example new technology, political opposition, timing, trends, language, popularity, media, location, customers, suppliers</p>

Organization and collaboration

A project can seldom be realized by one person. There must be a project team or collaborating partners who have the ability to execute the different types of tasks.

Assemble a team with a strong profile of competencies that supplement each other – for example financial, communication, development etc.

It is important that everyone is motivated, takes responsibility and contributes equally. If one person dominates, it will often demotivate the others. It can also damage the sense of community if one person is a "free rider" who does not contribute.

To prevent conflict, agree on a set of ground rules for working together. For example how often you will meet, preparation time, etc.

If conflicts still arise, nip them in the bud by discussing them openly in the group and focus on correcting what went wrong.

Presentation of the team

Consider how you will present the team's competency profile. Many foundations, investors and collaborators look closely at the project group before getting involved in a project.

They will typically ask:

- Does the group have the necessary competencies to execute the project?
- Has the group worked together before?
- Does the group seem convincing and serious?
- Do the individual members have relevant experience?
- Is the group aware of their weaknesses and prepared to fill in the „gaps“?

CV

Be sure to include CVs from all members of the group.

Exercise: Assemble the project group

Assemble the right team by conducting a SWOT analysis on the group's members.

1. Gather together, and consider which qualities each of you brings to the table. Conduct a SWOT analysis by asking each other what your strengths and weaknesses are.
2. Be sure to distribute tasks in a way that makes the best use of the group's competencies. It is important that everyone is ready to work together and that a clear distribution of tasks is established.
3. Always begin working together with a clarification of expectations.
4. Select a leader for the project and project group. The leader should regularly make sure the group's rules are followed and that tasks are completed as agreed upon, and that all are engaged.

Does everyone agree about the project's goal and vision?

Have all the tasks been assigned?

Does everyone understand the distribution of tasks?

PR & Communication

No matter how good and thorough your project is, it is not worth much without a recipient. This is usually the target group, which has been summarized in the stakeholder analysis.

In order for the target group to participate in the project, they must first be made aware of it. Therefore, you must consider the project's PR and communication components early in the project's development.

This is what determines how the outside world – audience, customers, collaborators, foundations, media, etc. – sees the project.

In other words, PR and communication are a significant factor in whether or not the project succeeds.

Further reading

We recommend the [CAKI Handbook in PR and Communication](#), which guides you in planning and executing communication, marketing and press-related tasks.

Exercise: Dissemination of the project

Think about how the project will be communicated to the outside world.

Answer the following questions.

- Which target group should see the project?
- How will it be made visible? For example via network, social media, website or a launching event?
- What visual and stylistic tone should the project have?
- Which media should be contacted?
- When should the dissemination activities take place? Constantly or in a short, focused period?
- Who should be responsible for communication and marketing?

Finances and Budget

As project leader, you must have an overview of the project's combined finances and ensure that the project is financially sustainable. A project should be financially realistic, and your budget must be able to prove it.

The budget is a sketch of the project's expected income and expenses. When you make a budget, it is therefore important that you are as precise as possible, so you do not end up using more money than there is available.

Consider each budget line carefully, and research the price of every item. Use Google and phone calls to gather all the required price quotes.

REMEMBER!

Always remember to keep receipts! You must use the receipts as documentation of the final account records, which you will also submit as documentation to for example SKAT and foundations. Some foundations will revoke funding if you do not provide valid receipts, just as you can encounter problems with SKAT with tax deductible expenses if your transactions are not documented.

Budget Types

Depending on your project, you may need different types of budgets.

These can be:

- A budget for development showing income and expenses for the project or company's development
- A budget for establishing the initiative, showing income and expenses for the project or company's establishment
- A budget for operations which provides an overview of the project or company's daily expenditures
- A budget for activities (project budget) which shows income and expenses for individual activities.

The first three budgets are used in projects which include a development phase, an establishment phase and an operational phase. These are typically larger projects which take place over a period of at least a year and often longer.

For smaller (and shorter) projects, an activities budget is often sufficient.

Further reading

For a more comprehensive introduction to budgets and accounting, see [CAKI Handbook – Financial Management](#), which also includes examples of other budget types.

Examples of budget posts

Below are examples of typical budget lines.

Production/Closing:

- Equipment
- Lodging and meals
- Light and sound
- Tech
- Furniture
- Cleaning
- Materials
- Production assistants
- Subcontractors
- Transportation
- Photography
- Refreshments
- Insurance
- Copyright and KODA

Administration:

- Project manager
- Project assistants
- Consultants
- Producers
- Facilities
- Telephone and internet
- Copies and printing
- Contracts
- Legal and accounting
- Meeting expenses

PR and marketing

- Website
- Text and graphics
- Printing of posters and flyers
- Photography

Note! When applying for funding, be aware that some foundations do not support all types of budget lines.

Further reading

Looking for help with fundraising?

[See CAKI Handbook – Fundraising](#)

Exercise 1: Budgeting

Make an adequate budget

1. Research the project's income and expenses. Be realistic and avoid under- and over-budgeting.
2. Record income and expenses in an Excel sheet in two separate columns.
3. Create columns for both the budgeted and the actual expenses and income. This makes accounting easier.
4. Make two budgets: One for your own use, where you itemize each individual budget line, and a shorter version for foundations or collaborators where you summarize the budget's main lines.

Get budget examples here:

<https://caki.dk/project/okonomistyring/?lang=en>

[Development budget](#)

[Operation budget](#)

[Activities budget](#)

[Liquidity budget](#)

Project description

So far, we have covered the following elements of the project:

Objective and goal-setting, process and planning, stakeholders, strengths and weaknesses, organization and cooperation, PR and communication, and finances and budget.

Now it is time to rewrite this information in the form of a good project description!

The content of your project description will depend on who the recipient is: the project group, collaborators, colleagues, foundations, media or some other stakeholder.

You should always write your description from the angle of the recipient. If the document is intended for internal use between colleagues, address considerations about staffing and structure.

If it is for a foundation which supports Nordic culture, emphasize the Nordic element in the project.

A project description should:

- Awaken curiosity and tell the project's core story
What difference will the project make in the world? What is new about the project's idea or vision?
- Address the project's relevance
Why should others be interested in the project? Who is the project relevant to – and why?
- Show action
How will you complete the project? How will you ensure that the project is visible to others? What is the financial plan?
- Create trust
Do you have strong collaborators? Experience from earlier projects? A thorough project description?

8 tips for making a project description

1. Be brief and concise, and start with the most important information. Start with a very short and catchy description of what the project is about.
2. Be specific when describing the project's process and content.
3. Use examples to help the reader visualize what you are writing about.
4. Engage the reader: Create pictures, surprise, use feelings and humor.
5. Avoid (too much) professional jargon.
6. Write your text as a whole without loose ends or contradicting information. Read the text out loud to yourself. Does it sound natural? If not, imagine you are telling a friend about your project. How would you express yourself?
7. Target the text: Angle your project description toward the recipient. Write only what the recipient needs to know to understand the project.
8. Keep it brief! The project description must not be too long. The content should only fill 2 - 4 A4 pages and can be supplemented with extra documentation such as budget, CV, illustrations etc.

Content of the project description

Make an adequate budget

Did you forget anything?

Who's responsible: Name, email address and phone number (for example in document's side header) for the person in charge of a given task.

Background: Where did the idea come from? Why is it a good idea? Does it fill a need in society, the target group, or the world?

Vision, goal and objective: What is the project's aim?

Target group: Who is the project for?

Collaborators: Short introduction and description of their role in the project.

Form and content: List the main points of the project.

Process: Activities plan with deadlines (also functions as timeline).

Marketing and communication: Describe strategy for visibility.

Budget: Provide relevant budgets.

Evaluation and documentation: How will you evaluate the project and report the results? See next chapter on evaluation.

CV: Include CVs for central persons if showing the project description to outside parties who may not know you or your project.



PART 3

EVALUATION



Think ahead!

Evaluation can happen continuously as well as when the project is completed.

Often the evaluation is downgraded because it may seem unnecessary to spend time looking back, when the project is underway or already well over. But the evaluation is an important tool for you and others to learn from the experiences that have been gained in the process.

By reflecting on the process and learning from any mistakes, you also get a chance to make up for bad habits and set new guidelines for future projects. You should plan for evaluation during the various project phases, so that it is an integral part of the project plan from the start.

Involving all of the team

Everyone involved in the project should participate in the evaluation. Depending on their role, they may be involved to varying degrees.

The evaluation can take place both individually and in plenary.

Individually, eg in writing, because it gives the individual the opportunity for anonymity. Plenum because the dialogue between different parties can create new thoughts and ideas. And one should not underestimate the importance of everyone meeting at the end and having the opportunity to say what they did not get to say in the process, pat each other on the shoulder and round up the work.

It is rarely to be considered a failure, if you did not achieve exactly the goals you had defined in the beginning. It may be that you have learned something new from the turn the project took, and you have led the project in a better direction, changing goals and success criteria as the project unfolded. Therefore, evaluation should not be a cash settlement of goals and results. Instead, focus on what you have learned from the project and what knowledge you can pass on to others. It is the knowledge that is valuable.

Exercise: Questions for the evaluation

The evaluation begins with the goal you defined for the project to begin with.

Therefore, start by reviewing vision, goals and sub-goals, and then ask each other:

Did we deliver what we were supposed to?

- Did we deliver on time?
- Did we deliver quality?
- Did we meet the budget?
- Did we work well together?

Then you can look ahead and ask:

- What could we do better?
- What did we learn that we can use next time?
- What learning can we pass on to others?

Feel free to pick up on the questions and discussion in a text document that can be shared with those involved in the project. This could be useful, if you or other members in the team need to do a similar project some other time.

Evaluate on an ongoing basis

Even if it is a project without a specific end date, eg a company or an association, it is still relevant to evaluate on an ongoing basis.

Especially because you have the opportunity to influence the work while it is going on.

The evaluation can take place as an ongoing activity, which can advantageously be carried out after you have completed milestones in the project.

For example, after a presentation, settlement of an event, in dialogue with the customer when they have tried a product etc.

Reporting

If the project is a study project or supported by a foundation, you may have to make a report at the end of the project. Perhaps the foundation or other project partners require that results and experiences of the project is made visible for a larger public. In this case, you have to meet the requirements that are being set – otherwise you risk losing the money that has been granted to the project.

It is often crucial that by the end of the project you can share the results you have achieved.

You can do this in many ways. You can, for example, disseminate the project using:

- A publication
- A film
- A blog
- A website
- A reflection report
- A presentation
- A logbook
- An infographic
- An article for a trade magazine

Voila!

You have now been through the key phases of your project. From the early stages of idea development over the seven core elements for the project description and evaluation.

From here, it's about turning your plans, goals and visions into reality. You probably have practical experiences and personal experiences in store that you cannot prepare for - and that's exactly as it should be!

We hope that with this handbook we have provided you with useful knowledge and tools you can draw on when you encounter challenges both before, during and after the completion of the project.

Good luck!