



# **PARTNERS' TOOLKIT**

Towards Creative Partnerships -  
Artists Developing Projects

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# INTRODUCTION

## Towards Creative Partnerships - Artists Developing Projects

We have developed this simple toolkit in response to a perceived need, by both early career and student artists and non-arts project commissioners, for some simple project guidelines and information to help build better projects.

The toolkit will suggest:

“...A process that allows us to ask the right questions and have the right conversations across different sectors where the work is made and between the different stakeholders who hold the practice.”

(Hutchings, 2014)

Our initial research included two case studies, which identified key project stages and the issues that are likely to occur:

Stage	Common Issues
Initiation	Aims, objectives, commitment, suitability, availability, making progress, responsibility.
Resources	Partners, expectations, availability, priorities, legal concerns
Delivery	Consultation, obligations, expectations, communication, production, responsibility, stalling, legal issues.
Monitoring & Evaluation	Methodology, responsibility for, discussion of findings, flexibility.
Completion	Point of conclusion, making of finished piece(s), definitions of success, recognition.
Promotion	Ownership, opportunity, options, permissions.
Post Project	Legacy, debrief, references, on-going relationships.

The Toolkit is divided into sections, written for the artist and the commissioner. Issues and subsequent actions are often different for both parties.

Projects are varied and there is more than one way to initiate and run a project – this is not designed to be a prescriptive methodology.

The Toolkit identifies common stages and asks questions to enable you to identify ways of moving a project forward, identifying possible issues before they become problems and enabling you to articulate your project/practice to others.

# **PARTNERS' TOOLKIT**

This questionnaire is designed to help project partners from non-arts organisations work with undergraduate, early-career and inexperienced artists on arts based projects.

This toolkit looks at common themes relating to developing and delivering arts projects and gives advice on common concerns. It will be flexible enough to use a broad range of scenarios, such as:

- Artist initiated projects, i.e. when they approach you to develop exhibition or performance opportunities for their work
- Organisation initiated projects, i.e. providing themed workshops within a gallery, school or hospital
- Initiating call-out or opportunity listings
- Any type of project where you work with an artist and have to negotiate a time frame, objectives and an end goal.

Answering these questions should enable you to:

- Identify what your organisation hopes to gain from your involvement in the project
- Examine the expectations of all parties participating in the project
- Assess whether the artist is a 'good fit' with your requirements
- Articulate what you could bring to the project, to articulate both to the artist and within your organisation
- Monitor any changes in requirements as the project develops, and ensure it still matches your needs
- Anticipate any potential problems and know how to manage them should they occur
- Maximise the opportunities that can be gained from your involvements within the project
- Identify 'best practice' so you can utilise it for future practice and projects
- Recognise your personal contribution to such projects

# Initiation

This section will consider:

- The aims and objectives of the project
- The commitment the artist and partners will need to make
- The suitability of the artist to the project
- Your availability to work on it
- Your areas of responsibility

**Project name:**

**Aims and objectives:**

Focusing on what the project will look like at the end helps set expectations for all those involved.

**Anticipated project start date:**

**Anticipated project end date:**

Why this end date? Is it flexible?

**What is the project budget?**

How is the project funded? Who are the financial stakeholders?

**What is your role?**

This could be as a facilitator; problem solver; administrator; project manager; budget holder or liaison between group members.

**What are the key stages?**

List them and their deadlines.

**What are the expected outcomes of the project for you?**

What are you hoping to achieve by organising this project?

**Why is this a good opportunity for you?**

What are you hoping to achieve by being part of the project or opportunity?  
Write down 3 or 4 things and rate them in order of importance.

**What is your prior experience of being involved in projects like this?**

**What don't you want from this project?**

**How much time do you have/have you allocated for the initiation and delivery of this project?**

How will you monitor the time you devote to the project. This will include meetings regarding initiation and development in addition to progress meetings. Take careful note of action points from meetings, these are arenas where a project takes shape and changes. All parties must agree to these staged changes.

**Who are your partners in delivering the project?**

**What are your partners' prior experience of being involved in projects like this?**

Have they been involved in any projects like this before?

**Who will be taking what roles?**

Who is the project leader? Who holds the budget and pays invoices? Who makes decisions? Who is in control?

**Who else from your organization and your partner organisation(s) needs to be involved?**

Who needs to receive what communication and who is ensuring this happens? Is there someone else who needs to sign-off decisions in all these organisations. What is the mechanism for approval?

**What do the project partners expect you to bring to the project?**

**What other organisational goals is this project related to? How might changes in those areas affect this project?**

**Task: Now use the information you have compiled to discuss the project aims and objectives with partners, including the artist. Note where they are the same and where they differ. Can differences be accommodated within the project? How?**

# Resources

This section will consider the nature of the resources you will need to fulfil the project objectives – the other people, materials, facilities and, perhaps most importantly, time, it will take. It will look at:

- Who is responsible for organising these resources
- Who will take legal and/or financial responsibility for them
- What happens to them after the project is complete

Where will the project be located? Is it fit for purpose?

What materials are required? Who will provide them?

Who will you be reporting to within your organisation on the progress of the project?

Are you going to need to sub-contract anybody?

Do you want ownership of the work after the project? Who will maintain it?

Will it belong to you as the project commissioner? Or are you happy for the artist to retain full rights over it after the project has ended?

Will you be asking partners to sign a contract (even if the project is voluntary)?

Partners should be protected by a contract. This may be written via e-mail or letter, or a formal written contract that all parties sign.

**Will you be paying partners? If not, what other 'value added' benefits will you be providing?**

e.g. travel expenses, meals, drinks, training, involvement in organisational events, mentoring, references, testimonials. Are you expecting these to be paid by partners then reimbursed? If so, what is your mechanism/timeframe?

**Who is responsible for providing insurance?**

E.g. will an artist need public liability insurance? What level of cover is required and will you be reimbursing the costs of this cover?

**Are you expecting the artist to abide by your organisations procedures?**

i.e. safeguarding/lone working, working with children, accident reporting etc. If so who will go over these with the artist?

Do you expect the artist to have a DBS (Disclosure and Barring Service) Check? If so will you pay for this?

**Will partners be able to engage in the same/similar project somewhere else or is it specific/exclusive to this particular commission?**

Similarly are you expecting to take ownership of the work produced? If so will you maintain and insure it?

# Delivery

By 'delivery' we could refer to the provision of workshops, the completion of a design, the staging of an exhibition or performance, the installation of work in a space. In its broadest sense, we are referring to the point at which the artist interacts with others to actualise your project – to make it happen.

This section looks your project 'audience' – by which we mean both the participants in the project and those who will see the completed work.

It will consider:

- The audience's expectations
- How you can best meet the audience's needs
- The legal issues that occur when working with others

Why are/were the participants chosen?

What input have they had into the project?

What expectations do they have?

What are the particular needs of the group of participants you will be working with?

Will you require a risk assessment?

Are there any data protection issues? Do you require participants to sign release forms?

Are there safeguarding issues?

Who should your partners speak to if they have any concerns about participants?

# Monitoring & Evaluation

Monitoring and evaluation are of critical importance in any project to ensure that the project has fulfilled everyone's objectives.

Monitoring refers to checks made as the project progresses to make sure it stays on track and is functioning as planned. Monitoring a project also allows you to track benefits as they occur, rather than struggling to document them perhaps months or years later when the project ends.

Evaluation is usually a more detailed survey taken at project completion to assess the overall benefits that have resulted from the project for all involved. It will consider both best practice and where lessons can be learnt for future projects.

**How will project progress be monitored?**

**How will it be documented?**

**Who will decide if any changes need to be made to the project plan?**

**How often do you require progress reports?**

**How much flexibility does this project have?**

Which parts of the project are 'immovable'? What happens if the project needs to evolve?

**Who is responsible for keeping the project on track?**

How will they keep the project focused whilst also developing it?

**Who are the 'opinion formers' in the project?**

These are a large part of any project and need to be kept on board/taken into account even if they are not officially part of the process. They may be local councilors, local press etc.

**When would you consider the project a failure? What would be the repercussions of this?**

**Is there a clear process for you to end the project if you feel it is undeliverable?**

What will be the process if you feel that the project isn't deliverable or not working?

# Completion

This section will consider the stage at which this project will be considered complete. This may be a difficult point to quantify and so you will need to consider:

- What is the point of conclusion? Who will decide?
- When is your role complete?
- Who will be responsible for finishing the project?
- Who needs to make any final checks and 'sign off' on completion?
- How can you recognise peoples' contributions even if they are not part of the final stage?

### **What will the end of the project look like?**

What needs to happen for the project to be complete?

### **Who will be responsible for producing the 'final piece'?**

Think about how much involvement you are expecting when the project concludes. Will you mind if it was your organisation's idea but another partner will be seeing it through until the end?

### **How will it be evaluated on completion?**

Benefits may extend beyond participants to families, carers, schools, and other organisations. How can you monitor this?

### **How will you define whether this project has been successful?**

### **Has your contribution been formally recognised? If not, how can it be?**

# Promotion

This section considers:

- The key points you might want to highlight in any publicity
- The media you should target
- Fulfilling any legal obligations to the project partners.

**Is there anything new about what you are doing/have done?**

**Who might be interested in knowing more about the project?**

Consider not just the media and special media, but other arts organisations, peer organisations, university departments, funders, and relevant bodies.

**Who is responsible for marketing/promoting the project?**

Do you want the work to be advertised/ marketed and if so, how are you going to do it?

**Who is responsible for marketing/promoting the project?**

Do you want the work to be advertised/ marketed and if so, how are you going to do it?

**Can the partners promote their involvement separately?**

# Post Project

Our research suggests this is a crucial part of any project – for both partners and artists. In conjunction with final formal evaluation, it is an opportunity to review your involvement with the project, ensure the ongoing legacy of the project, build on-going relationships and consider the types of future projects you and your organisation wish to become involved in.

Who has benefitted from the project?

What have you learnt from your involvement in the project?

Would you do anything differently?

What are the 'value added' benefits?

Would you get involved with this sort of project again?

What is the main thing that you have learnt?

Were there any unexpected benefits?

How has your organisation benefitted from your involvement?

How will you maintain relationships with your partner(s) after completion?

Is the outcome what you imagined? Are you happy with it? Is everyone?

How will you share information regarding outcomes and evaluation with other partners?

What happens to the participants now? Do they need to be signposted to further projects?

# Case Studies

Case Study # 1 :

Glandŵr Cymru the Canal and River Trust in Wales

Case Study # 2 :

Creative Signage Project, Wrexham Maelor Hospital

# Case Study # 1: Glandŵr the Canal River and Trust in Wales

## Project Overview

*Addo* were appointed by Glandŵr Cymru, the Canal and River Trust in Wales and the Arts Council of Wales in September 2013 to curate and manage a three-year programme of artist residency projects. These residencies are exploratory and research based, that is, they are not a prelude to making large-scale artworks but are an opportunity for artists and curators in Wales to undertake a creative investigation of ideas, people and places. The residencies are unique to that place and look at specific ideas in each locale. Locations include North Wales along the Llangollen stretch of the Shropshire Union Canal, in mid Wales on the Montgomery Canal, and in the South on the Monmouthshire and Brecon Canal and Swansea Canals.

## Aims & Objectives

CRT's initial aims in developing the project idea with ACW were :

- The residencies should inform the strategic case for the arts as part of the Trust's Major Engineering Works and Waterside Developments in Wales
- That new Partnership Agreements are developed with leading cultural and heritage organisations and creative industries based next to or near key waterways/docks in Wales
- That Contemporary Arts Development & Programming roles should be continued with professional development for Trust staff
- That further funds be created to establish a continuing Contemporary Arts Programme for the Waterways in Wales
- That Contemporary arts as an integral part of the Trust's work in Wales be championed at a senior level
- And that there should be an increased awareness of the waterways in Wales, with measurable increase in visitor numbers and creative industries along the waterways

## Activity

*Addo* developed a series of artist's briefs for the project, which reflect the ethos of the programme, point to the history and culture of each location and clearly define what is expected from the appointed artist within this research stage.

For the toolkit we interviewed Mair Hughes who was appointed to the Montgomery residency, in which the artist is to look at the ecology of the canal in relation to a growth in tourism. The residency ties in with a Heritage Lottery Bid to enhance the landscape corridor and to conserve the aquatic plants of the canal, which is a Site of Special Scientific Interest. The Welsh section of the canal is also designated a Special Area of Conservation due to the presence of rare aquatic plants, otters and water voles.

Mair has undertaken the research phase which she described as 'alternative fieldwork'. This can be best described by Mair's mindmap, which shows how all the disparate information gathered from her contact with local residents, tourists, Glandŵr Cymru staff and experts (for example archeologists) can begin to be processed and made sense of by an artist.

She has also engaged with the wider public through a series of events that have included contributing to existing activity such as the 'Making Waves' festival at Llanymynech.

## Legacy & Outcomes

The programme has been a success in that it has begun to address some of original aims of the project (creating contemporary art projects, building local relationships, working with staff and volunteers, spreading the message about contemporary arts practice, creating events, building audiences and building partnerships). Additionally it has produced some really interesting ideas for works. The planned exhibition and publication should tie the whole programme together, enabling the artists to create some of their proposed projects. The exhibition will be a great final event, making the end of this stage, which we envisage will lead to further work with artists across the Welsh network.

## Case Study # 2 : Creative Signage Project, Wrexham Maelor Hospital

### Project Overview

This project involves collaboration between Glyndŵr University Fine Art Department and Betsi Cadwaladr University Health Board (BCUHB) Arts in Health and Wellbeing Programme. The co-ordinator for Health and Wellbeing programme approached Sue Liggett (Reader in Art and Design) who teaches on the fine art programme in Oct 2014 about the possibility of student working with the outpatients department to improve the signage for visitors. Students on the BA(Hons) fine art programme undertake a 20 credit module every year called Creative Futures which specifies that they find relevant work experience for future employment. This may be for example a work placement, the curating of an exhibition of artwork or finding other ways to engage an audience with their artwork. Personal and professional development is 'embedded' across the life of a degree course and is at its best when delivered through participation in real-life projects and placements such as this.

### Aims and Objectives

The main aim was to enhance signage in the Wrexham Maelor Outpatients Department through the creative use of additional artwork and signage.

The objectives included identifying a team of students to manage, create and deliver new signage solutions that help patients and service users navigate the department effectively and that also builds partnerships between BCUHB and Glyndŵr University.

### Activity

The creative signage project was pitched to students by the co-ordinator for health and wellbeing at BCUHB, and then those that were interested were briefed on the details of the involvement. The first formal meeting at the Hospital was arranged in February 2015, and a core team of 4 students had the opportunity to discuss initial ideas to staff at the outpatients dept. Feedback was given and students adapted their ideas in light of the advice given. The project was used as an example of 'best practice' at the annual Nursing Conference held at Glyndŵr University in June 2015 where the students were invited to presents their ideas generated from the brief in a different context. Since June 2015 students have been adapting ideas and in autumn, 2015 they will re-present modified ideas to the hospital in preparation for the development and installation of the work. The project is on- going and has no particular deadline, however students have been advised to complete the project before they enter 3rd year. There was no specific budget for the project however the hospital agreed to cover the cost of the materials.

## Legacy and Outcomes

Initial Outcomes for students include:

- Credits gained for BA(Hons) fine art Creative Futures module
- Talk provided for students on 'Art in Hospitals' from the Arts in Health and Wellbeing co-ordinator, BCUHB
- Tour of outpatients department
- Presentation of initial ideas to staff in outpatients at Maelor hospital and feedback given
- Presentation of project and feedback given at annual nursing conference
- Ideas realised at the Outpatients Department
- Students receive guidance from ADDO on project management
- Students contribute to research towards developing ArtWorks Wales Toolkit Initial Outcomes for Maelor Hospital
- Cost effective way of improving signage
- Strengthening relationships between Art in Health and Wellbeing Co-ordinator, Glyndŵr University and The Maelor Hospital
- Means of receiving feedback about the signage in the department

The project has extended relationships between Glyndŵr University's fine art department and the Maelor Hospital that will hopefully lead to further projects with students in the field of health and wellbeing in local hospitals within BCUHB. Projects with external stakeholders help shape the fine art curriculum development to ensure that graduates are equipped for employment. Glyndŵr University's Media Arts and Design Research Centre's strategic plan aims to extend research that has a focus on community engagement and partnerships like this may lead to more ambitious research projects that impact on the local community and potentially employment within NE Wales. It is also hoped that BCUHB can build these partnerships into its strategic planning to enable other departments to benefit from similar projects.

# GLOSSARY

Accident Reporting	The procedure by which any incident or accident is noted and acted upon. This may be verbally or written via a specific accident form/book
Aims	What the project intends to achieve - it's purpose. The project may have more than one aim. The partners may have different aims to each other.
Audience	<p>The people who will witness the project upon completion. If the project is in public realm though, there could have an audience whilst the creative process is occurring.</p> <p>Considerations should include who the audience might be, how to engage the audience (i.e. how will they know about the project) and how will that engagement be managed (i.e. what they will do when they interact with the project).</p>
Best-practice	Acknowledged procedure for going about a particular task or action that has been proved to get better results than other methods e.g. an produce a guidance for best practice on paying artists.
Call-out	Open advertisements for artists opportunities such as exhibitions and residencies which require a response from artists.
Commissioner	An organisation or individual tasked to deliver a project or in the arts engage an artist to deliver a project or artwork.
Contract/ Sub-contract	<p>An agreement made by two or more parties regarding duties or roles, which have legal obligations. It is usually a written document which listing a series of points which are agreed on and signed by the parties signing up to them. Contracts can also be made by a short letter. Agreements by e-mail or verbally are becoming more common. There must be an indication that both parties have agreed to the content.</p> <p>To sub-contract someone is to hand over a portion of work to someone else. Usually the original employer requires that they agree to this or are informed before a sub-contractor is brought in.</p>
Data Protection	The data protection act controls how your personal information is used and stored by organisations (including government departments and businesses). In essence you cannot pass on information such as addresses, phone numbers, e-mail etc which have been given to you by an individual for one purpose i.e. to sign up for a workshop to someone else without that person's prior agreement.

DBS	Formally a CRB (Criminal Records Bureau) check, the Disclosure and Barring Service (DBS) now checks, and issues a document, on a persons suitability to work with certain groups (children, vulnerable adults (those with mental or physical disabilities, the frail elderly etc). The check looks at any previous recorded offences including cautions or prison terms.
Deliverable/ Undeliverable	A statement of whether planned activity is achievable, or not, within the project terms.
Disclosure	<p>Disclosure refers to confidential information partners may be given about the project, the other project partners and/or the participants.</p> <p>This could be indirect disclosure (verbal, written or drawn suggestion or inference), direct disclosure (where someone involved directly tells you) or third party disclosure (someone else tells you this information).</p> <p>There should be a clear procedure for dealing with these situations.</p>
Documentation	The process of recording the project. This could be via written information such as reports, hand-outs and other texts such as blogs, web-posts or via photographs, films or animations.
Early career artist	An artist who has graduated but isn't yet considered 'established' in a particular field of artistic practice.
Evaluation	Monitoring and evaluation are often linked together. Evaluation is usually a more detailed survey taken at project completion to assess the overall benefits that have resulted from the project for all involved. It will consider both best practice and where lessons can be learnt for future projects.
Fit for purpose	Whether something is appropriate for the use to which it is put e.g. holding a talk in a room which has room for 20 when you have 40 people booked to attend.
Insurance	The most common insurance an artist is asked for is Public Liability Insurance which protects the artist, and any employer, should the artist be sued for negligence during the day-to-day course of their activities. Sometimes artists are asked for Professional Indemnity Insurance this covers for faulty work i.e. if a sculptural object should disintegrate because it is not made properly.
Invoice	A document generated by a seller (of goods or services) listing items for payment. It states fees/rates; address; date; payment method and details; terms (the maximum amount of days before payment should be received) and whether the originator is VAT registered or not.
Legacy	How the project or work from a project will continue into the future. E.g. a project legacy may be a publication or website which will be available beyond the end of the project.

<b>Methodology</b>	A statement of how something will be done. This is usually a series of steps i.e. research methodology will include desk research, site visits and interviews.
<b>Monitoring</b>	Monitoring refers to checks made as the project progresses to make sure it stays on track and is functioning as planned. Monitoring a project also allows you to track benefits as they occur, rather than struggling to document them perhaps months or years later when the project ends.
<b>Non-arts organisation</b>	Any organisation, involved in your project, that doesn't have art as a core function e.g. a hospital trust. The organisation may well have experience and staff working in the arts but they will represent a small part of the organisation.
<b>Objectives</b>	<p>A goal or step on the way to achieving the project's aims. A good analogy is that it was your aim to cross a river your objectives will be the stepping stones you need to cross it.</p> <p>Objectives should be SMART – specific, measurable, achievable, realistic, timed.</p>
<b>Opinion Formers</b>	They are generally people in the arts with an overview of contemporary arts practice. These people will actively talk about your project, through social media, but also as examples of good (or bad) practice.
<b>Organisational goals</b>	A companies strategic goals set out as a staff guide to help achieve group outcomes.
<b>Ownership</b>	Feeling an affinity towards the project in such a way that it becomes yours.
<b>Participant</b>	Those people who take part in your project, i.e. the people who will take part in workshops, or the people who respond to a survey.
<b>Partner</b>	The organisation, or team of people who are initiating, managing and funding the project.
<b>Procedures</b>	A set of, often written, guidance towards how something should be done. For example child protection procedures.
<b>Progress Report</b>	An interim (staged) report that lets everyone know how the project is going. This differs from the end of project report in that it points towards things that remain to be done, often indicating a timeframe.
<b>Project budget</b>	The money (in cash and other resources) allocated for the project. It includes income (what/where the cash is coming from) and expenditure (where and on what the cash will be spent).

Project Leader	The person who leads the team of partners.
Project Originator	The person or organisation that originally came up with the idea for the project. They are not necessarily the people funding the project.
Quantify	Often used in the arts to begin to measure projects or events which may otherwise be seen in terms of quality alone. i.e often projects are asked to state the amount of participants/audience members.
Questionnaire	A survey which attempts to measure attitudes to an issue by gaining responses to a series of questions which have a choice of answers.
Resources	Can be money, materials, skills or time which can be used towards a projects goals.
Risk Assessment	A systematic examination of a task, job or process that you carry out. This then identifies any significant hazards or risks that are present in the activity. These identified risks can then be better managed.
Safeguarding	The systems required to protect children and vulnerable adults from the risk of physical, mental or emotional harm.
Sign-off/ Completion	This is the formal completion of a project. It may include filling in a form or agreeing with partners that a project is concluded.
Toolkit	A set of resources that map set out a particular task and a series of tools, which aid the completion of that task.
Voluntary	Working on a project without receiving a financial payment. However money may be reimbursed for expenses such as travel, food or accommodation.
Value added	Increasing the value of a project as it develops by, for example, adding activity, such as community workshops, talks or making new partnerships.
Workshop	A meeting or group activity whereby something is thoroughly discussed or made/created.

# TOOLS

We have included a series of tools here which we and our interviewees feel can aid the development and delivery of a project at specific stages. You may not need to use all, or any of these. Some have been developed for use in this Toolkit, others have been found on the internet. We have therefore decided to include a link to these here so that they can periodically be reviewed and up-dated.

A zip file of the tools can be downloaded at: <http://www.addocreative.com/toolkit/tools.zip>

# ACKNOWLEDGEMENTS

This Toolkit was developed from conversations between Addo and Dr. Susan Liggett (Glyndwr University) around issues of developing quality artist projects. Addo had identified this as a subject to investigate some time previously. The Artworks Cymru Seed Fund enabled us to address some of these issues and positively change the experiences of early career artist, students and partners working together on visual arts projects.

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