

Transforming Future Museums: International Museum Academy Greece

Project Management Toolkit

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i Introduction

International Museum Academy Transforming Future Museums

Museums and galleries in Greece are experiencing change, rapid growth, and transformation. These changes accelerate the need to train a new generation of museum leaders. In response to this need, the British Council launched **Transforming Future Museums** (January 2016 – July 2018), an intensive professional development programme designed to boost the museum and heritage sector in Greece by enabling it to respond to the challenges and possibilities of a new era.

The programme offers organisations and individuals the necessary support and tools to test new ways of working: build tactical collaboration channels, and: generate long-term working relationships based on peer-to-peer learning and exchange of good practice. The core part of the programme is the International Museum Academy, taking place in Athens and Thessaloniki, in October and November 2016 and 2017.

The courses comprising the first International Museum Academy in Greece were:

- Project Management for Museums
- Developing Exhibitions
- Fundraising and Income Generation
- Audience Development

https://vimeo.com/217152476

In order to add value to face-to-face training courses and to widen the knowledge shared in those sessions with a wider audience we have commissioned these digital toolkits.

The Transforming Future Museums programme is a British Council initiative supported by the Stavros Niarchos Foundation.

Course introduction

Welcome to the IMA Project Management toolkit

We hope that this toolkit helps demystify the technical language that surrounds project management. It explores some of the skills and resources that project managers can access and aims to give you confidence to initiate, lead, or take part in projects within your organisation.

Project management doesn't have to be based on technical jargon, complex methodology, and computer programmes. If you develop some key skills around organisation, problemsolving, and communication, and combine that with a great deal of listening and learning from others, you will be in a good place to lead and contribute to projects.

A key role of project managers in museums and the cultural sector is to keep users, audiences, and communities at the heart of all decision-making. With competing drivers affecting budget, timescales, technical parameters, and collections care, the voice of the user can get lost in the mix. To constantly challenge and question relevance, access, and usability is therefore vital. We hope you find this toolkit useful – explore it, use the links, and learn from the case studies. Ultimately, the best thing you can do is to talk to other people about the lessons they've learnt from their own projects and put some of that learning into practise within your own organisation. Most of all, enjoy it – because if you can embrace the uncertainty, challenge, and mental juggling, project delivery can be one of the most rewarding things to do within the museum and cultural sector.

Tutor biography

Sara Hilton is a consultant for museums, culture, and heritage. She started life in television production before falling into the museum and exhibition design world in the early 1990s. She was Head of Heritage Lottery Fund (HLF) in the North West of England from 2008 to 2016, overseeing a significant project portfolio and leading HLF's strategic relationships across the region. Prior to that (2002–2007), she was Director of Projects at National Museums Liverpool (NML), responsible for running a wide range of exhibitions, refurbishment, and larger capital projects across NML's eight venues. She was also Head of Design and Exhibitions at the Museum of Science and Industry in Manchester between 1999 and 2002.

The unusual mix in Sara's career means that she is able to offer unique insight around museum project management. She has a rounded and deep understanding of the relationship and dynamics between the project, funder, client, consultant, and stakeholder. Sara was the founder of the Capital Projects Network in the UK, and has lectured widely on museums, capital development, and project management.

Five things to know about project management

- **1.** Clarity of vision and brief it's vital to get the vision, brief, and parameters clearly defined at the project outset. By getting clarity agreement and buy in for the project timescale, budget target audience and objectives, you provide a strong foundation for the project.
- 2. Coordination a project involves the organisation and coordination of a number of elements, therefore a project manager needs the ability to juggle different actions, timescales, budgets, and work streams.
- **3.** Common sense it's not rocket science: a pragmatic and logical approach is key to effective project management.
- **4. Creativity** while the project manager is usually managing the creative process of others, a creative and flexible mind will help solve problems and find innovative solutions to the challenges that will inevitably emerge along the way.

But most importantly...

5. Communication – at the core of any successful project manager is the ability to communicate well with others, from technical meetings and stakeholder presentations to difficult one-to-one conversations.

01 What is a project?

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Let's start at the beginning: what is a project?

If you ask a search engine you will see a range of complicated diagrams, all looking rather technical and slightly daunting.

It is not a straightforward journey. There will always be risk and complexity, but the more you understand the process, the more you can reduce the false starts and manage events that are beyond your control. You will be better prepared to manage the challenges that appear along the way.



Eva Jiricna / EJAL



There are a number of definitions for what a 'project' is:

"A unique, transient endeavour undertaken to achieve planned objectives."

- Association for Project Management

"A temporary endeavor undertaken to create a unique product, service, or result."

<u>www.pmi.org</u>

"An activity that has a beginning and an end which is carried out to achieve a particular purpose to a set quality within given time constraints and cost limits."

- Chartered Management Institute

"A project is a temporary organisation that is created for the purpose of delivering one or more business products according to an agreed business case."

– Office of Government Commerce

A project differs from the ordinary course of business as it has a defined beginning and end. It is created to achieve a specific objective and has dedicated resources. By nature, projects are temporary so they will almost certainly bring new challenges for team members and any organisation.

Project teams are also temporary structures, brought together for the life of the project, and the team members may not have worked together before – they will therefore need time to develop ways of working as a group.

Projects have a number of characteristics:

- Change projects are the means by which we introduce change or create new products.
- Temporary projects are temporary in nature, contrary to business as usual. They should have a defined start and a defined end.
- Cross-functional projects involve a team of people with different skills working together.
- Unique every project is unique defined by an objective, team, subject, audience, location, etc.
- Uncertainty projects have a level of risk i.e. uncertain factors (positive or negative) that can significantly affect it.

What is a project?

Meeting a project's objectives on time, on budget, and at a quality standard acceptable to the organisation requires robust management.

Project management is the application of knowledge, skills, tools and techniques to plan activities in order to meet the project requirements. It has always been practiced informally, but began to emerge as a distinct profession in the mid-20th century. The Project Management Institute (PMI) publishes A Guide to the Project Management Body of Knowledge (PMBOK® Guide) which co-creates global standards for project management.

Project management draws on 10 areas:

- 1. Integration how do all the activities fit with each other?
- 2. Scope how should we manage the brief that the project has committed to delivering?
- **3. Time** when do the project activities need to take place and how do they depend on each other?
- 4. Cost how much will the project elements cost and how will the budget be developed, agreed upon and monitored?

- **5. Quality** how will we ensure that deliverables meet the quality standards?
- 6. Procurement how will the different elements of the project be procured to ensure best quality and value for money?
- 7. Human resources how will we manage the project team and the wider cross-departmental relationships that are required?
- 8. Communication how can we ensure effective communication about the project, both internally and externally?
- **9. Risk** how will we identify, analyse, monitor and respond effectively to project risks?
- 10. Stakeholders how will we manage our internal and external relationships to ensure that they contribute positively to the project?

Adapted from www.pmi.org

Getting the balance right

Project management is traditionally seen as a balance between three things, often called the 'project triangle':



However, it can be more helpful to split 'Brief' into 'Scope' and 'Quality'.

In that way, project management can be seen as the balance between four elements:

It is vital to have an open conversation at the start of the project to agree the relative importance of those four elements and ensure clarity on the key drivers for the project. For example, if a new gallery is being developed for a key anniversary, then time is of critical importance and it is possible that it may require increased budget to deliver. If the scope increases, then it will require more budget, take more time, and/or be done at a lower quality standard. One or more of the elements have to change if another is modified.



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Why do projects fail?

Projects progress in a completely different way to normal business operation and can be challenging for organisations.

These are some factors that are common to unsuccessful projects:

- Poor definition of the project brief
- Specifications poorly researched or defined
- Lack of appropriate skills and experience
- Users not placed at the heart of project focus and decision-making
- Insufficient engagement by senior management
- Lack of positive communication and engagement with stakeholders
- Unrealistic timescales
- Unrealistic budget
- Poor risk identification and management
- Lack of change management control



02 Project management processes

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'If you fail to plan, you are planning to fail.'

– Benjamin Franklin

The five project management processes illustrated below are based on the project stages from the Institute of Project Management (www.pmi.org), but modified to include evaluation as part of the closing stage – a vital element within any audience-focused project. The five key stages provide the overall framework for the project journey, but are also the steps that need to be taken within different areas of project management, as you'll see below.

There are a number of general considerations that will help to ensure project success:

- Realistic timescales and budget
- Clear project team structure
- Robust project programme
- Proactive cost management
- Allowing time for visitor evaluation
- Timely delivery of internal inputs
- Robust management of stage boundaries
- Good mechanisms for colleagues across the museum to feed into the development
- Clear client review and sign-off
- Effective stakeholder communications
- Balancing different priorities

Five main stages of project management:



What makes a good project manager?

Project management involves a range of skills:

- Leadership
- Decision-making
- Ability to understand technical discussion (but not detailed technical knowledge!)
- Team-building and management
- Problem-solving
- Ability to thrive under pressure
- Negotiation
- Flexibility and adaptability

But at the heart of all good project management are the five Cs:

- 1. Clarity
- 2. Common sense
- 3. Coordination
- 4. Creativity

but most importantly...

5. Communication!

Communication is the key skill behind successful project management – open, honest and clear dialogue will be needed throughout. Early project management theory focused on the technical aspects of the role and communication was sometimes not mentioned at all. Communication is now recognised as fundamental to enabling smooth project progress. When a project has problems, one critical conversation handled in the right way, or one group meeting that facilitates dialogue, can help identify a solution and prevent delay.



Developing the project brief

"A Project Brief is a statement that describes the purpose, cost, time, and performance requirements, and constraints for a project."

– Managing Successful Projects with Prince2 (Axelos)

It's vital to develop a clear and coordinated brief for the project at the outset. This will form the foundation of the project and can be used to monitor its progress as well as evaluate its success.

The brief should set out answers to the following questions:

- What is the project vision?
- What are the key objectives for the project?
- What are the key drivers e.g. conservation, learning, people, income?
- Who are the target beneficiaries?
- What is the budget?
- Are there any programme constraints?
- What will the project deliver?
- What will the project not deliver?
- How will the project be delivered?
- What wider resources will be available for the project?

Once approval is obtained for the project to proceed, the first step is to further develop the project brief in order to create a more extensive 'Project Initiation Document' (PID).



In the museum and cultural sector the PID needs to address a number of areas in more detail:

Project vision – A clear, concise statement on the core purpose and aim for the project (this is a challenge – try to keep it maximum 150 words!)

Key objectives – What are the key outputs or outcomes that you want to achieve?

Target audiences – Who are the key audiences that the project is aimed at? Are there target visitor numbers to be met? How are these projections being informed – are they based on evidence from audience research, previous visitor surveys or similar projects?

Interpretation strategy – What are the initial ideas on how the interpretation will be approached in the project, based on the agreed target audience?

Key content and messages – What are the main content areas for the project? Are there key artifacts to be included in the design of an exhibition?

Timescale – When does the project need to be delivered by? What are the key dates to be met?

Budget – What funds are being made available for the project? Does the money need to be spent within a certain timescale?

Income – How is the project going to be funded? Is there need for fundraising (and what is the projected timescale for this, as it will impact on the delivery programme)?

Learning objectives – What are the learning outcomes for the project?

Access – What are the key requirements in terms of accessibility?

Maintenance – What consideration needs to be given to ease the maintenance and increase the durability of the exhibition, gallery or new interpretative tool?

Risks – What are the key risk areas that have been identified and how will they be managed?

Getting the right project structure

It's important to create a robust project structure at the outset of the project.

All but the smallest museums are usually structured into functional areas or departments. This can lead to a 'silo' mentality of people being focused on their specific area, with little communication with other museum departments.

Projects usually draw people from different functional areas to work together in the Project Team.

Project = Matrix management

This 'matrix management' has particular challenges as the project manager will not usually have direct line management responsibility for the team. If there are performance or behaviour issues the project manager need to speak openly and honestly with the heads of department so that this can be tackled.



Key characteristics of a good structure are:

- Clear and simple structure be aware of dotted or overlapping lines!
- Clear areas of authority, responsibility and reporting
- Representatives included from across the museum departments – e.g. front of house and learning colleagues can sometimes be overlooked, but will have vital contributions to make

For a new exhibition or gallery project, the team structure will look something like the diagram below.

When you're putting your team together, sketch an organogram to show how the team will be structured. This will probably include a working group for each of the main areas of project activity.

It's likely that the working groups will involve people from different departments. Therefore you will need to find a competent chair who is able to facilitate discussion, but keep the meetings focused and enable clear actions to be agreed.



Project management processe:

Roles and responsibilities

Ultimately, the governing body of the museum is responsible for delivering the project and managing the associated risk to the organisation. Within the public sector this is usually a Board of Trustees. However, the day-to-day running of the project will be delegated to a Project Team, who will sometimes report to a Project Steering Group.

For smaller museums, the structure will be much simpler and project responsibilities may be combined with numerous dayto-day tasks. However, it is just as important to ensure that you have roles, responsibilities, and reporting lines defined at the outset so that there is clarity for the team.

The roles and responsibilities of the groups and individuals within the project structure are set out over the next few pages.

Project Sponsor

- Main decision-maker with overall responsibility. Usually leads the Project Board.
- Accountable for the business case and ultimate approvals on financial commitments.
- Can decide to end a project if it is not going to lead to the intended benefit or is putting unacceptable risk on the organisation.
- Usually the museum Director/CEO but could also be the Chair of Trustees.

Project Board

- Approves strategies, implementation plans, scope and milestones, but does not have day-to-day involvement.
- Receives regular overview reports on highlights, budget, programme and risks, and will keep an overview of project risk on behalf of the organisation.
- Reports to organisation's governing body.
- In smaller museums, the role of the Project Board might be filled by the Board of Trustees, or the senior executive team.

Project Steering Group

- Within larger organisations, there's likely to be a Project Steering Group who will oversee the delivery of the different work packages.
- The Group discusses project activity in greater detail than the Project Board, and would work through options to address risk that arises, so that clear recommendations are presented to the Project Board.

Project Manager

- Responsible for the Project Team delivering the project in budget, on time and to the agreed scope.
- Develops the project plan with the team and manages project delivery against the plan.
- Ensures clear acceptance and approval of deliverables from Project Sponsor.
- Responsible for communication, reporting, risk management and escalation of issues that cannot be resolved in the team.
- Requirements for the role are often underestimated.
 It's important to have someone with the right skills and experience.

- The role can be undertaken by an existing member of staff and offers a valuable professional development opportunity

 it should be noted that this requires good support mechanisms in place.
- For larger projects, it may be necessary to create a fixed term contract and appoint someone externally.

Project Team

- Directed by Project Manager.
- Responsible for delivering the project in accordance with the agreed brief, programme and project plans.
- For larger projects, the Team will be broken down into different functional groups, each with a chair or lead who should sit on the Project Steering Group so that there is a clear channel for reporting between the groups. The working groups might include capital work, exhibition/ content development, conservation, marketing business planning and closer to opening, operational preparation.
- The Team will include members from within the museum and external organisations.

Stakeholders

- People who have impact, will be impacted by, or perceive themselves to be impacted by the project.
- Museums have complex range of stakeholders, which the Project Sponsor and Project Manager need to consider.

Project Administrator

- Provides administrative support to the Project Manager.
- Pulls together reports to the Project Board or funders.

Activity

Think about how a project within your own organisation might be structured.

Remember: no matter how large or small your museum is, you need a clear structure.

Refer to the tool on the following page.

Tool: Project structure

Project management processes

Who will be the Project Sponsor?	Draw the proposed structure for your project team
Would you have an internal Project Manager?	
What different working groups will you have?	
Who would oversee the project – do you need a Project Steering Group, or will this be done by the Executive Team?	

Project programming

Projects, of all sizes, need to be broken down into manageable stages. Each stage should have clearly defined outputs as well as a review and approval point at the end so that there is clear sign-off before the team moves on to the next stage.

Within the UK, most large capital projects are planned using the work stages defined by the Royal Institute of British Architects (RIBA):

The RIBA Plan of Work website (<u>www.ribaplanofwork.com</u>) provides comprehensive information on the Plan of Work. This is most applicable to architectural projects and provides detailed information on the responsibilities of the different team members at each stage of a project. For a museum exhibition or gallery development, the project stages are often based on the RIBA Plan of Work, but adapted to suit the exhibition design process.



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Project management processes

\bigcirc	RIBA		The RIBA Plan of Work 2013 organises the process of briefing, designing, constructing, maintaining, operating and using building projects into a number of key stages. The content of stages may vary or overlap to suit specific project requirements. The RIBA Plan of Work 2013 should be used solely as guidance for the preparation of detailed professional services contracts and building contracts.				aplanofwork.com		
RIBA Plan of Work 2013	0	1	2	3	4	5	6	7	
Tasks 🔻	Strategic Definition	Preparation and Brief	Concept Design	Developed Design	Technical Design	Construction	Handover and Close Out	In Use	
Core Objectives	Identify client's Business Case and Strategic Brief and other core project requirements.	Develop Project Objectives, including Quality Objectives and Project Outcomes. Sustainability Aspirations, Project Budget, other parameters or constraints and develop Initial Project Brief. Undertake Peasibility Studies and review of Site Information.	Prepare Concept Design, including outline proposals for structural design, building services systems, outline specifications and preliminary Cost Information along with relevant Project Strategies in accordance with Design Programme. Agree alterations to brief and issue Final Project Brief.	Prepare Developed Design, including coordinated and updated proposals for structural design, building services systems, outline specifications, Cost Information and Project Strategies in accordance with Design Programme.	Prepare Technical Design in accordance with Design Responsibility Matrix and Project Strategies to include all architectural, structural and building services information, specialist subcontractor design and specifications, in accordance with Design Programme.	Offsite manufacturing and onsite Construction in accordance with Construction Programme and resolution of Design Queries from site as they arise.	Handover of building and conclusion of Building Contract .	Undertake In Use services in accordance with Schedule of Services.	
Procurement *Variable task bar	Initial considerations for assembling the project team.	Prepare Project Roles Table and Contractual Tree and continue assembling the project team.	The procurement s of the design or th Information Excha route and Building of out the specific tend stage in	The procurement strategy does not fundamentally alter the progression of the design or the level of detail prepared at a given stage. However, Information Exchanges will vary depending on the selected procurement out the specific tendering and procurement activities that will occur at each stage in relation to the chosen procurement route.					
Programme *Variable task bar	Establish Project Programme.	Review Project Programme.	Review Project Programme. The procurement route may dictate the Project Programme and may result in certain stages overlapping or being undertaken concurrently. A bespoke RIBA Plan of Work - > 2013 will clarify the stage overlaps. The Project Programme will set out - > the specific stage dates and detailed programme durations. - >						
(Town) Planning *Variable task bar	Pre-application discussions.	Pre-application discussions.	Planning applic Planning applic A bespoke RIB	ations are typically made using the A Plan of Work 2013 will identify v application is to be made.	e Stage 3 output. vhen the planning>				
Suggested Key Support Tasks	Review Feedback from previous projects.	Prepare Handover Strategy and Risk Assessments. Agree Schedule of Services, Design Responsibility Matrix and Information Exchanges and prepare Project Execution Plan including Technology and Communication Strategies and consideration of Common Standards to be used.	Prepare Sustainability Strategy, Maintenance and Operational Strategy and review Handover Strategy and Risk Assessments. Undertake third party consultations as required and any Research and Development aspects. Review and update Project Execution Plan. Consider Construction Strategy, including offsite fabrication, and develop Health and Safety Strategy.	Review and update Sustainability, Maintenance and Operational and Handover Strategies and Risk Assessments. Undertake third party consultations as required and conclude Research and Development aspects. Review and update Project Execution Plan, including Change Control Procedures. Review and update Construction and Health and Safety Strategies.	Review and update Sustainability, Maintenance and Operational and Handover Strategies and Risk Assessments. Prepare and submit Building Regulations submission and any other third party submissions requiring consent. Review and update Project Execution Plan . Review Construction Strategy , including sequencing, and update Health and Safety Strategy.	Review and update Sustainability Strategy and implement Handover Strategy, including agreement of information required for commissioning, training, handover, asset management, future monitoring and maintenance and ongoing compilation of As- constructed' Information. Update Construction and Health and Safety Strategies.	Carry out activities listed in Handover Strategy including Feedback for use during the future life of the building or on future projects. Updating of Project Information as required.	Conclude activities listed in Handover Strategy including Post-occupancy Evaluation, review of Project Performance, Project Outcomes and Research and Development aspects. Updating of Project Information, as required, in response to ongoing client Feedback until the end of the building's life.	
Sustainability Checkpoints	Sustainability Checkpoint – 0	Sustainability Checkpoint – 1	Sustainability Checkpoint – 2	Sustainability Checkpoint – 3	Sustainability Checkpoint – 4	Sustainability Checkpoint – 5	Sustainability Checkpoint – 6	Sustainability Checkpoint – 7	
Information Exchanges (at stage completion)	Strategic Brief.	Initial Project Brief.	Concept Design including outline structural and building services design, associated Project Strategies , preliminary Cost Information and Final Project Brief.	Developed Design, including the coordinated architectural, structural and building services design and updated Cost Information.	Completed Technical Design of the project.	'As-constructed' Information.	Updated 'As-constructed' Information.	'As-constructed' Information updated in response to ongoing client Feedback and maintenance or operational developments.	
UK Government Information Exchanges	Not required.	Required.	Required.	Required.	Not required.	Not required.	Required.	As required.	

RIBA Plan of Work 2013 template, reproduced with permission by the Royal Institute of British Architects.

1 01 **02** 03 04 05 06 07 **2**

HKD working practice | Project stages | Overview

Project procedure



The stages below list the project milestones of exhibition design and fabrication, mapped to the RIBA plan of work stages.

> STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5	STAGE 6	> STAGE 7
Preparation and brief	Concept Design	Developed design	Technical design	Construction	Handover and close out	In use
Start up meetings Analysis of brief Develop brief Review architects plans Identify research areas Review collections Identify narrative themes Review and finalise brief	Research stories and facts Site survey and analysis Technical review Establish M&E requirements Team workshops Test concepts with community Sketch designs and plans Circulation options Concept visuals and models Outline budget allocation	Adjust concept following review Draft preliminary script outlines Commission illustrations if required Test designs with focus groups Prepare audio visual outlines Establish AV presentation techniques Select materials and colours Outline specification and budget Refine schedule of works Manage specialist suppliers	Adjust design following review Prepare full specification Prepare full design drawings Identify approved suppliers Review costs and budget Co-ordinate schedule with client Co-ordinate schedule with construction team Issue tender documents Review tender returns Advise on contractor selection Manage specialist suppliers	Shop drawing review Value- engineer tender returns Oversee graphic preparation and printing Prototype and test interactive elements Administration of fabrication contract Administration of specialist suppliers	Climate control Exhibition furniture Case dressing Test and train staff Snagging Operation manuals	Evaluation As constructed drawings
	HLF submission	HLF submission				

Houghton Kneale Design Ltd, United Kingdom

www.HKD.uk.com

Activity

Below is a blank 'project stages' chart for an exhibition design project and a number of actions to be completed.

Cut out the actions on the page and see if you can place each action within the stage that they will need to be undertaken.

As there is no standard plan of work for exhibition design, each design practise will have their own version. This version is inspired by one developed by exhibition designers Houghton Kneale Design (<u>www.hkd.uk.com</u>) and is recreated here with their permission.

Cut out the tasks on page 27 and place in appropriate Stage on page 26.





Tool: Project Stages 1/2

01	02	03	04	05	06	07	?
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Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6
Preparation and brief	Concept design	Developed design	Technical design	Construction	Handover and close-out

Tool: Project Stages 2/2



Start up meetings	Review and finalise brief	Test concepts with target audience	Commission illustrations if required	Issue tender documents	Administration of fabrication contract
Analysis of brief	Concept Design	Sketch designs and plans	Test designs with target audience (focus groups)	Review tender returns	Administration of specialist suppliers
Develop brief	Research content	Concept visuals and models	Prepare audio-visual outlines	Advise on contractor selection	Handover and close out
Review architects plans	Site survey and analysis	Outline budget allocation	Establish audio- visual presentation techniques	Manage specialist suppliers	Test stable environmental conditions
Identify research areas	Technical review	Developed design	Select materials and colours	Construction	Exhibition furnitur
Review collections	Establish Mechanical and Electrical requirements	Adjust concept following review	Outline specification and budget	Review construction drawings	Case dressing
Identify interpretive themes	Project team workshops	Draft preliminary script outlines	Refine schedule of works	Review tender prices and make savings as necessary ('value engineering')	Test and train staf
Manage specialist suppliers	Technical design	Adjust design following review	Prepare full technical specification	Oversee graphic artwork and printing	Snagging
Prepare full design drawings	Identify approved suppliers	Review costs and budget	Coordinate schedule with construction team	Prototype and test interactive elements	Operation manual
In use	Evaluation	As constructed drawings			

1 01 02 03 04 05 06 07 2

Gathering client input

Once you've got your designers on board, you will need to agree on the project stages – making sure that there is a shared understanding of what's required from the Client Team at each stage.

The quality of the client information, and close engagement throughout the design process, is vital to ensuring success as the designers can only work with what you give them. The quality of communication is key – it often helps to hold workshops with the designers to ensure that everyone understands the parameters and shares the creative vision.

Each stage of the project design will require the next stage of detailed information to enable the Client Team to progress designs to the next level. This means that when agreeing on the programme, you must give careful consideration to the time required to develop the next package of briefing information.



Client inputs – Designer outputs



Managing the transition between stages

The transition from one project stage to the next is key to managing the programme. At the end of each stage, the Project Steering Group should receive updated information on all areas so that they can give approval to move on to the next stage.

The information provided at the end of each stage should include the points on the following page.

Once the Project Steering Group is satisfied with the answers, they will be able to approve progression to the next stage of the project. With complex projects, this can take time to achieve as the team may need to amend some areas or provide further reassurance. The approval should be formally documented, along with any areas that need to be addressed during the next stage.



1. Content and Design

Updated content and design, detailed to an appropriate level. Questions for the Project Steering Group:

- Do the designs meet the quality requirements set out in the Project Brief and/or Project Initiation Document?
- Will the designs meet the project objectives?
- Will the designs allow for the learning objectives to be met?

2. Budget

Estimated costs, based on the designs at that stage. Questions for the Project Steering Group:

- Can the proposed designs be delivered within the budget?
- Are there adequate allowances for contingency and inflation?
- What level of confidence can there be in the estimates (i.e. have they been prepared by someone with suitable experience, have they been informed by quotes for specialist elements etc.)

3. Programme

Updated project programme. Questions for the Project Steering Group:

- Can the project still be delivered within the original timeline?
- Is there enough time to complete the internal inputs?
- Is there enough time for the approvals and stage transitions?
- Are there key dates that need to be adhered to (anniversaries or funders requirements)?

4. Risk

Updated risk management table. Questions for the Project Steering Group:

- Is the risk level acceptable?
- Are any further mitigations required?
- Is the level of budget contingency in line with
- the project risks?

01 02 03 04 05 06 07 2

The quality of costing information is vital as cost estimates will lead to decisions about what can be afforded within the project scope. Poor cost estimates will lead to abortive work which may mean that projects are progressed which cannot be covered by the approved budget.

03 Managing the budget

There are two main approaches to project budgets; the budget might be set in advance and the team then need to define what can be delivered within that budget, or; the team might be assigned a brief and asked to estimate the budget.

Either way, budgeting is an iterative process, with the cost estimates gradually refined at each stage.

Guiding principles

The Project Team and Project Steering group should consider the following when establishing their project budget:

- Adopt a systematic approach to estimates and budgeting
- Ensure that cost information is provided by people with suitable knowledge and experience
- Build informed costing using benchmarking and comparing similar projects
- Ensure that the budget and estimated costs are carefully reviewed at the end of each stage
- Ensure that the level of contingency is appropriate to the level of risk at each stage

Contingency

Contingency is the budget allowance that is set aside to allow for variations in cost estimates.

The contingency budget is specific to each project but should cover:

- The development of designs
- Construction risk (e.g. if work is being done on a difficult site, or where budget estimates have not been informed by investigative work)
- Risks related to client change or changes in the local political or legal environment
- Predictable risks
- Unforeseen risks

The contingency can be calculated based on a percentage of the budget estimate or by using the result of a costed risk analysis. This latter method provides a more accurate contingency level, as risks can vary significantly, and is now seen as best practice.

Construction cost inflation

For architectural projects and large exhibitions, there should be a separate allowance for construction cost inflation – in particular where development is planned to run over several years.

There are a number of different reasons for construction cost inflation:

- General economic context
- Market capacity
- Material costs
- Labour shortages and wage increases
- Increasing profit margins

To understand the level of cost inflation that your project might be subject to, it is important to understand the general levels of inflation within the construction industry in your region as this will often be much higher than the general inflation rate within the economy. For example, when a number of cultural projects are being delivered in one region, this will lead to elevated prices.

1 01 02 03 **04** 05 06 07 **?**

04 Managing stakeholders

"A **stakeholder** is an individual, group, or organisation who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a **project**." – PMBOK – Project Management Book of Knowledge

You will see from the above definition that stakeholders can include a wide range of interested or potentially interested individuals and organisations. Stakeholders can have a positive impact on the project - for example by helping to identify potential funders, or by positively influencing someone who might disapprove of the project. Conversely, stakeholders can have a negative impact – for example by swaying opinions. It is therefore important that the team takes a proactive approach to managing their communication and engagement with stakeholders.

Following the project processes flowchart, stakeholder management breaks down into the following stages:



Identify your stakeholders

The term 'stakeholder' is often used to refer to senior decisionmakers and policy-makers. It is more useful to expand the definition, as outlined above, to include everyone who has a stake in a project, who might be able to influence it, or who might be impacted by the project process and outputs – from visitors and community members, to local residents and businesses. These stakeholders might be internal or external.

Internal stakeholders might include:

- Project team members
- Governing body (e.g. Board of Trustees)
- Curators
- Conservators
- Learning department
- Marketing/Communication department
- Other departments
- Visitor services

External stakeholders might include:

- Visitors
- Funders
- Partner organisations
- Other museums
- Community organisations
- Suppliers
- Press and media
- Local and national politicians



Analyse stakeholder influence

Once the stakeholders are identified, the team should analyse their importance.

To do this, it is best to look at the following key parameters:

- How much interest do they have in the project?
- How much power or influence do they have on the project?

The 'stakeholder quadrant' to the right helps map the relative interest and importance of the different stakeholders.

The quadrant enables the team to decide where to focus their communications and efforts.

Stakeholder quadrant



Monitor:

- Stakeholders who have the least impact on the project, and aren't that interested.
- Require minimal effort
- Use general communication such as newsletters to keep them informed

Keep informed:

- People and organisations who are interested, but do not have much influence
- Involve them in low-risk areas
- Consult the stakeholders on areas of interest
- People/organisations in this box can be helpful as supporters or ambassadors

Keep Satisfied:

- Stakeholders with high level of influence, but low interest
- Engage and consult on interest areas
- Try to increase their level of interest. Aim to move them into the right hand box, i.e. Key players!

Key players:

- People and organisations who have significant influence and a high level of interest
- Focus your efforts on this group
- Involve in governance and decision-making
- Engage regularly

Research and prioritise

Once stakeholders are mapped out using the quadrant, the team can research and prioritise their efforts. This can be done through a mixture of quantitative and qualitative research, formal and informal.

For more information on research, please refer to the IMA Audience Development Toolkit.

01 02 03 04 05 06 07 2

Implement and monitor

The Stakeholder Management Plan needs to be reviewed regularly – either during the regular Project Team Meetings or during a dedicated meeting.

Constant monitoring helps identify whether you need to go through the complete cycle of stakeholder identification, analysis, and research again, or whether the Plan just requires minor updates.

Managing stakeholders requires a clear and methodical approach. It involves understanding who your stakeholders are, identifying their motivations, and establishing how to meet their needs. As with all other areas of project management, communication is key – keep talking to your stakeholders to understand their motivations and perceptions, and if you cannot meet their requests, let them know why!



Activity

Developing a Stakeholder Management Plan

You are now ready to compile your Stakeholder Management Plan. This pulls together the information from your stakeholder identification, analysis, research, and prioritisation, and presents it in a spreadsheet that should be circulated regularly to the Project Team.

The template on the following page shows a sample format for the Plan – you should decide how detailed it needs to be based on the complexity of the project.

Refer to the Stakeholder map tool on the following page.

Tool: Exercise

0	01	02	03	04	05	06	07	?

Stakeholder	Key interest	Issues	Current status	Interest	Power	Message	Action	Who
Planning authority								
Neighbours								
Lenders								
Funders								
Etc								

Activity

Step 1: Identify stakeholders

Write the names of all the stakeholders that you can think of on sticky notes.

Tips:

- Remember the broad stakeholder definition look back at what's included
- You may want to use a different colour for internal and external stakeholders – i.e. those within your organisation, and those from external organisations/ communities
- This is a brainstorming exercise so don't worry about the stakeholders' level of influence at this stage – we will look at that later





Activity

Step 2: Analyse stakeholders

Use the Stakeholder quadrant map to identify where the stakeholders sit in terms of level of interest and power/ influence. You may want to use a flip chart or white board.

Tips:

- Is there a good spread of stakeholders across the four boxes? You do not want too much concentration in the top right box – if so, you may be stretching your efforts too thinly
- Are you thinking that people have a high level of influence when they could just be managed differently?

Tool: Stakeholder quadrant



01 02 03 04 05 06 07 2

Activity

Step 3: Identify your stakeholder management actions

Once you've mapped your stakeholders into the quadrant, have a look and see where you can concentrate your efforts.

Tips:

- Are there people in the top right box that could be moved away – i.e. what could you do to reduce their influence?
- Who are the key individuals or organisations that you should focus on?
- What low-cost or low-effort actions will lead to the most positive impact? (for example, a community drop-in event or e-newsletter)

Tool: Stakeholder quadrant





05 Managing risks

"A risk is an uncertain event or condition that, if it occurs, has a positive or negative effect on a project's objectives."

– PMBOK – Project Management Book of Knowledge

Any project brings risk to the organisation, so the Project Steering Group will need to give full consideration to their 'risk appetite' early on. This appetite might change over time depending on previous experiences, or on the size, visibility, or innovative nature of the project.

Risk management involves identifying potential issues that might affect the project, analysing their risks, and putting a management plan in place to address them.

Risk management follows the following five-step process.



Breaking these steps down, risk management involves the following:

Identify the risks

It is good to involve as many team members as possible in a workshop to identify the risks associated with your project.

The workshops should start with identifying key areas of risk, for example:

- Content development
- Artifact and conservation
- Design
- Programme
- Budget
- Construction and installation
- Stakeholders

Once you've identified the main categories, move on to identify the risks which exist within them. This stage should be a broad brainstorming exercise – don't worry about analysing the level of risk at this stage.

Analyse the risks

Once the risks are identified, they need to be analysed by looking at their impact and likelihood. The accumulative impact of these two factors will give you the overall risk rating, and will enable you to concentrate your efforts. You can use the table below as a guide for analysis

Likelihood vs Consequences

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Impact (Consequence)

How severe could the impact be if the risk even occurs?

		Insignificant	Minor	Moderate	Major	Severe
	Almost certain	Medium	Medium	High	High	Extreme
ccurring?	Likely	Low	Medium	Medium	High	High
l (Frequency) chance of the risk oc	Possible	Low	Low	Medium	Medium	High
	Unlikely	Negligible	Low	Low	Medium	Medium
Likelihooc What's the	Rare	Negligible	Negligible	Low	Low	Medium

Decide on response and allocate responsibilities

After analysing the risks, the project needs to determine the appropriate response to these:

- Avoid Refrain from carrying out the activity that will result in the risk occurring
- Reduce/Mitigate Take action to reduce the impact of the risk, should it occur, or to reduce the likelihood of it occurring
- Transfer Pass all or part of the risk to another person or organisation
- Accept Understand and accept the consequences of the risk

Assign responsibilities

Next, you need to assign responsibilities - each risk should have a clear action and a lead person identified to take ownership of that risk.

Manage Risks

The information from the risk identification and analysis should then be drawn together and presented in a Risk Log. Fill in the Risk Log on the following page.

Monitor

Reviewing the Risk Log regularly is vital to ensure that agreed actions have been taken forward, the risk levels are reconsidered, and any new risks are identified.

The Risk Log should be reviewed at every Project Team Meeting and in the Project Steering Group. The Team will review all risks and associated actions, while the Steering Group members are likely to focus on the high-level risks that have greater potential impact on the organisation.

Tool: Risk Log

() 01 02 03 04 05 06		04 05 06 07	?
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Nature	Decription	Likelihood	Impact	Overall risk level	Action required	Person to action
Technical Market Financial Economic Management Legal		High Medium Low	High Medium Low Give a %			

Activity

Step 1: Identify risks

Identify and write down different risks on sticky notes - you could use different colours to identify the various risk categories, e.g. internal, design, programme, cost, funding, etc. Agree which categories are appropriate to your project with your participants.

Step 2: Analyse the risks

Group the risks into your agreed categories. Taking one risk at a time, think about their likelihood and potential impact on the project – you can put these straight into your Risk Log.

Step 3: Identify risk management actions

Once you've analysed the risks, decide what measure you will take to address each risk.

06 Learning lessons

The evaluation of the project process is a crucial part of project management as it ensures that lessons are learned and shared across the organisation for the benefit of future projects. This is not the evaluation of the outputs, but of the process itself.

The value of a 'lessons learned approach':

- Allows reflection
- Identifies what could have been done better
- Enables personal development
- Enables organisational development
- Enables sector development
- Develops a culture of ongoing improvement

Learning lessons at the end of the project can be challenging. Teams break up after completion as key staff and contractors move on to other roles. The process can also feel threatening, particularly when relationships have broken down, or when there is a 'blame culture'. Where possible, open and honest reflection can allow for valuable learning. The learning is multi-layered, from individual learning, through to wider lessons for the sector:



Collating the lessons

The 'lessons learned' process can be completed in various different manners.

Think about how the institution might draw the lessons learned into future project planning and delivery. What good practice could be built on and what should be amended? Identify what could be improved with your briefing documents, tender documents, contracts, budgets, programmes, templates, reporting, stakeholder communication, and so on.



1 01 02 03 04 05 **06** 07 **2**

Disseminating the lessons

How will the findings be shared internally or externally?



Write a case study or more in-depth article in a relevant sector publication

Run a networking event at your museum, inviting colleagues to come and hear about your project

External

Give a presentation on your project at a museums' seminar or conference

> Write a post-event press release or update newsletter

Final project reflections

Most importantly, make sure that you allow time to pause and reflect on your own journey, experiences, and learning before you move on to your next area of focus.

Project management and delivery can be one of the most challenging areas in museum practice, often pushing team members to the limit. However, they can also be positive, career defining moments – so take time to celebrate what you have achieved and learned!

07 Further reading/Appendix

Further reading and links to relevant projects which might inspire you.

Useful Websites:

- <u>www.ribaplanofwork.com</u> the dedicated website for the RIBA standard plan of work.
- <u>https://www.prince2.com/uk/what-is-prince2</u>

 useful introduction to PRINCE-2, the standard project management methodology. The PRINCE2 methodology is far more technical than most museums would need, but getting an overview can help inform your own project planning.
- <u>https://www.jisc.ac.uk/guides/project-management</u>

 a really helpful website, with a range of tools and templates.
- <u>http://www.swfed.org.uk/resource/project-</u> <u>management/</u> – South West Federation of Museums project management page, with links to other sites.

? Reflection and next steps

Reflection

and next steps

Three things I learned during this course 1.	One thing which I was reminded of during this course
2	One thing which surprised me during this course
3	

One key message I will share with colleagues

	One	action I	will t	ake	tomorrow	
--	-----	----------	--------	-----	----------	--

Tomorrow I will _____

Three actions I will take in the future	
I will	To achieve this I will need
I will	To achieve this I will need
I will	To achieve this I will need





The programme is supported by Stavros Niarchos Foundation