



C'man

Cultural Management Guide

PM²

Management

Contents

Introduction – What? Who? Why?	3
What is this?	3
Who is the PMc designed for?	3
Why do they need this?	4
About PM²	5
Why do we need a tailored methodology?	5
Background of the method	5
Introducing PM ²	6
Project life cycle – The four phases	7
The workflow	9
Initiating Phase	9
Planning Phase	28
Executing Phase	41
The section's central figure	41
THE DIVISIONS	42
Detailed description of the workflow	42
Closing Phase	45
Summary	48
Relevant literature	50
Appendix	52
The methodology	52
The workflow	52
Additional useful resources	53

Introduction – What? Who? Why?

What is this?

Dear reader, we hope that this guide you are holding will quickly become your favourite tool for your daily work. It is part of the C'man Erasmus+ project, whose goal is to enable cultural managers to adapt to the ever-changing cultural and creative sectors - hence CCS - market needs. The project focuses on three critical subjects that cultural managers must be familiar with: project management methodology, green management, and change management. This guide contains all the necessary information for you to easily manage the business aspects of your cultural area. Project management is not a mysterious science, but rather a practical approach that provides hints, crutches for orientation, and aids in providing clarity. This guide looks at project management from the cultural managers perspective. It is tailored to cultural projects of every size. By explaining the most important project phases and giving practical steps to them, it sheds light on how a well-known methodology is used in practise. This manual catalogues all the documents that provide a framework for navigating a seemingly infinite system of numbers, tasks, and calendars. It is critical to note that this is not simply a manual that we recommend reading, but rather a guide that is worth scribbling over and annotating, as it provides not only theoretical background, but also support for practical implementation.

Who is the PMc designed for?

The name “PMc” refers to project management for cultural projects. The guide’s primary target audience was identified as cultural managers. We would like to address those practitioners (beginners and advanced) who work in the broadly defined CCS. Our book is aimed at those who work on art-related projects, whether they are part of an organization or run independently. We would like to use the material to help students studying arts management or related cultural studies, both domestically and internationally. With our book, we also address freelance managers who are connected to the sector in a broader or narrower sense and operate within the nexus of art and management. Those who require artistic participation as well as business knowledge and experience for their profession. Our primary target group is multidisciplinary, with an emphasis on the arts. So, in a step-by-step guide, the book contains all information from a business approach that supports the management of the given project for the target group. It is important to note that the project book is not primarily aimed at experienced project managers who do nothing but project management, but rather at those for whom project management is a new and previously unexperienced task.

We have defined organizations active in the industry as a secondary target group for our project book, for whom the guide can also provide useful frameworks. Employees of the organization can use it to implement their projects, as well as use it as teaching material for students and employees, which helps their preparation even during one-on-one training. As a secondary target group, we address universities, training schools, cultural heritage centers, startups with an art focus, festival organizer companies, associations, and non-governmental organizations (NGOs).

Why do they need this?

The guide's primary goal is to provide cultural managers with a concise, easy-to-follow, comprehensible, and logically structured summary to use in their daily work, especially if business/management tasks dominate the to-do list. The creation of this guide facilitates the smooth implementation of for-profit and nonprofit value-creating projects, which result in added social value. The unspoken goal of the guide is to eliminate the mistakes frequently made in cultural project management by developing your own proficiency from the detailed guidelines. Project management is a time-saver: using this guide will help you to reduce planning time, increase flexibility in time management, improve group dynamics, and understand how to better estimate risk levels. We will assist in streamlining communication processes in a way that avoids problems or misunderstandings caused by poorly defined goals. Human resource management issues can be made easier by using the project book; simplified processes and transparent tasks help to clarify and recognize which employees can contribute most effectively in which work process. Proper time management allows you to map errors and omissions, as well as shed light on delays caused by micromanagement. The clarification of goals and processes enables evaluations to be more precise, and the work invested, and the outcome consistent. The project book helps recognize that a strict budget, which can be interpreted as a characteristic of cultural projects, compliance with funders processes and strict rules of tenders can become a flourishing opportunity rather than a burden to be fulfilled.

About PM²

Why do we need a tailored methodology?

A well-chosen methodology can be the key to optimizing processes and effectively completing our tasks. On the one hand, rules carry the risk of limit our thinking, but if we apply them correctly and manage them properly, they can provide excellent foundations for increasing the efficiency and orderliness of work. Building your own effective model takes a long time and a lot of resources. However, in many cases, learning a ready-made methodology, applying it, and possibly customizing it can provide an excellent solution. However, it is critical to use a methodology that has already been proven to work well, and that has not only worked in theory but has also been tested in practice by organisations of various sizes. This guide is based on the PM2 methodology, which is covered in detail in the following chapters.

Background of the method

The European Commission created PM2, a project management methodology designed to enable project managers to provide solutions and benefits to their organizations by organizing work effectively throughout their project's life cycle. The methodology was created to meet the needs of European Union institutions and projects, but it can be applied to projects of any size. PM2 is a straightforward methodology that project teams can adapt to their specific requirements. PM2 incorporates elements of globally recognized best practices, standards, and methodologies in project management. Its development was also aided by operational experts who had previously worked on numerous projects for EU institutions and external organizations.

Introducing PM²

The PM² processes, documents, tools, and techniques assist project actors in making compromise decisions based on the project's time, cost, scope, and quality factors. The PM² mindset includes attitudes and behaviours that assist project teams in focusing on the most important aspects of achieving project goals. This approach can support project teams in overcoming the challenges of project management within organizations.

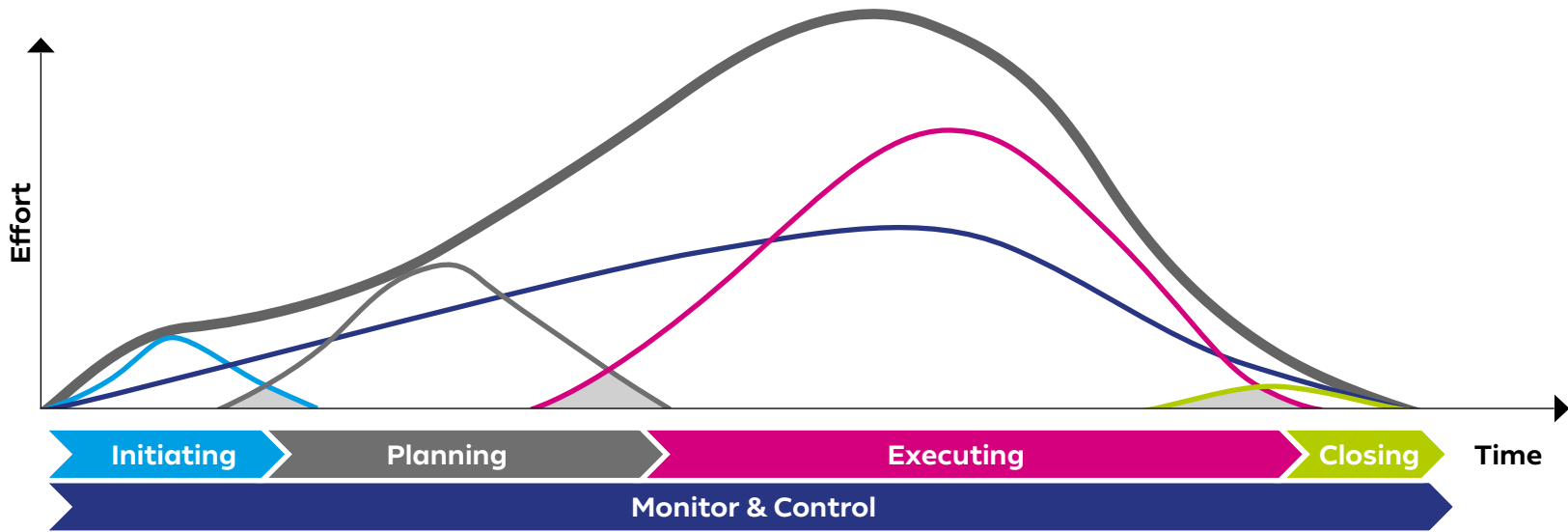
The PM² methodology is based on best practices in project management and is supported by four pillars:

1. project management model (roles and responsibilities)
2. **project life cycle (project stages)**
3. project processes (project management activities)
4. project documents (documentations and guides).

In this guide, we will focus in detail on individual stages of the project life cycle, as this provides a practical framework and a collection of documentation that, in addition to offering strategic direction, supports the optimization of final implementation.

Project life cycle – The four phases

In relation to PM2, we distinguish four stages based on the project life cycle, which is covered in this chapter. It is important to note that this is an overall picture that will be clarified later in step-by-step detail, and we will show which stage necessitates the inclusion of which documents in order for effective work to be completed.



1. Initiating

In this stage, the most important task is to start the project and determine the exact scope and outcomes.

2. Planning

The most important milestone in the planning phase is the formation of a strong project team and the start of the work planning process.

3. Executing

In this phase, the implementation plans are coordinated and the product outcome is ready.

4. Closing

The official approval takes place, the experiences that can be used in the future are formulated, the administrative closure takes place.

Monitor and Control

Monitoring and controlling the project tasks and management activities throughout the duration of the project.

Worth paying attention to the significance of the initiation and the planning phases. Too often the deliverables of these phases are inadequately executed because they mean little value to the end user. This is a common and costly error which can be avoided by dedicating enough time to the first two phases.

Essentially, each phase has a specific type of activity, but it is possible that some activities are carried out in neighbouring phases or are repeated. There is a certain degree of overlap between the phases. It is not uncommon, for example, for plans to be rethought several times during the execution phase. Consider the following scenario: we organize an exhibition, but on the day of the installation, we discover that a room is flooded, and we are unable to use that location. We are already in the execution phase, but we must abort the original plan and find a new solution.

When the previous phase's objectives are deemed to have been met at the official (or less formal) end-of-phase review, the project moves on to the next phase. Having these checkpoints in place raises the bar for project management and ensures that the project moves forward in a controlled manner. The project's focus shifts from initiation and planning activities in the beginning, to implementation, monitoring, and control activities in the middle, and eventually approval, transitional, and closing activities in the end.

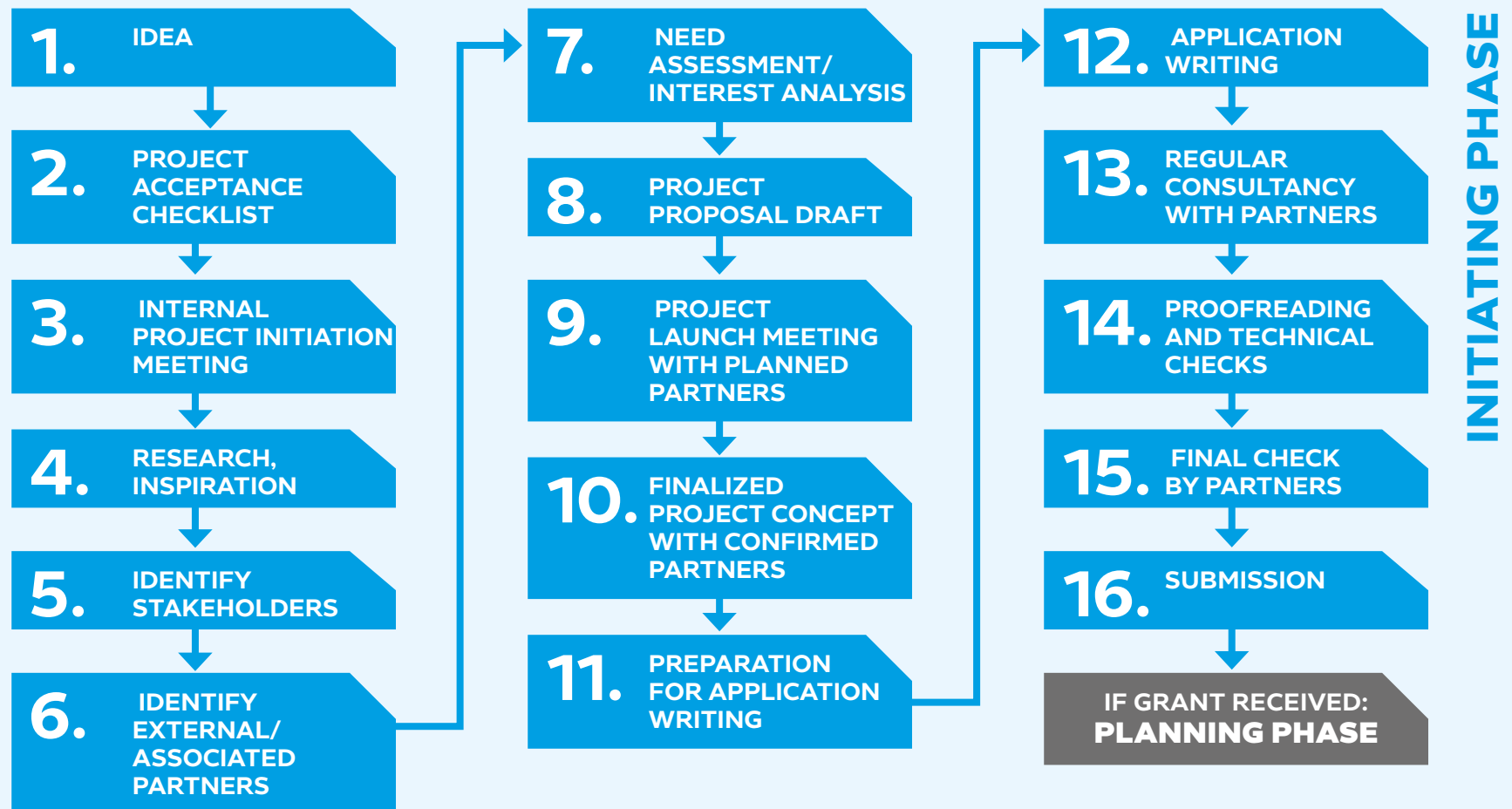
It is critical to use appropriate project documents during the duration of the project; failure to do so or misuse of the documents usually results in compromised quality and lower value for end users. This is a common and costly error that is frequently the root cause of total project failure and missed project benefits, so its significance should not be overlooked. For this reason, the following chapters provide a detailed review of the documents in each section, focusing on the purpose of the document, who is responsible, and when and how they should be prepared.

The workflow

INITIATING PHASE

The goal of this chapter is to examine the 16 steps that define the initiating phase (as illustrated in the figure below). We describe what the given step covers (**purpose**), what type of documentation (**artefact**) can be linked to it, and which **project participants** are responsible for the given task.

We will also highlight the milestones needed (**outputs**) that the proposal implementation in the initiating phase requires, how much extra work project participants save, and what added value it has. The goal is precise transparency and comprehension, so we try to bring concrete **tips and examples** from the art industry wherever possible.



1. IDEA

Purpose:

- developing an idea that can be transformed into a project
- concretizing, fine-tuning an idea
- making plans (potential partners and adopters, possible outputs etc.)

Output:

- a concrete and realizable project idea, which responds to the call's selection criteria and aligns with the call's objectives.

Participants:

- Project Owner
- Optional: team members of the organization and/or externals

Example & Tips:

- exhibition opening organization, creation of a new international cultural music festival, sales strategy development for a new non-profit company



2. PROJECT ACCEPTANCE CHECKLIST

Recommended artefact:

- [Project Acceptance Checklist \(link\)](#)

Purpose:

- checking that the planned project aligns with the mission of the organisation
- checking if the organization has enough capacity and motivation before the whole application process begins
- identifying risks

Output:

- Final decision to approve or dismiss the project

Participants:

- Project Owner
- Managing Director of the organization

Example & Tips:

- We can list the added value of designing the exhibition of a specific artist for a gallery in this document. How much visibility does it provide for our organisation, what does it mean in terms of image, and does it attract a new target group? This document will help us think about whether we have the necessary resources (financial and human) to start the project. At the same time, with the help of this in this document we can assess both the short and long-term risks of the exhibition.

3. INTERNAL PROJECT INITIATION MEETING

Recommended artefacts:

- [Project Proposal \(link\)](#)
- [Project Meeting Rules \(link\)](#): This is a guide for a successful meeting implementation. It is worthwhile to study right before the first project-related meeting to ensure a successful, focused, and well-organized meeting. Importantly, this supporting document can serve as the foundation for all future discussions, whether they are offline or online, and regardless of the number of participants.
- [Project Meeting Guidelines \(link\)](#)
- [Project Meeting Checklist \(link\)](#)
- www.miro.com - a great virtual tool for visualizing the project design
- Some additional suggestions (proven methods) for effective implementation of this section: [Impact Generation Model \(link\)](#), [Impact+ Exercise Table \(link\)](#), [Problem Tree \(link\)](#), [Gantt Chart \(link\)](#), [SWOT analysis \(link\)](#)

Purpose:

- presenting a fine-tuned idea to the team members in detail
- joint brainstorming session with the team
- selecting a potential Reviewer and External Expert from the team and clarifying team roles and responsibilities from the very beginning



Output:

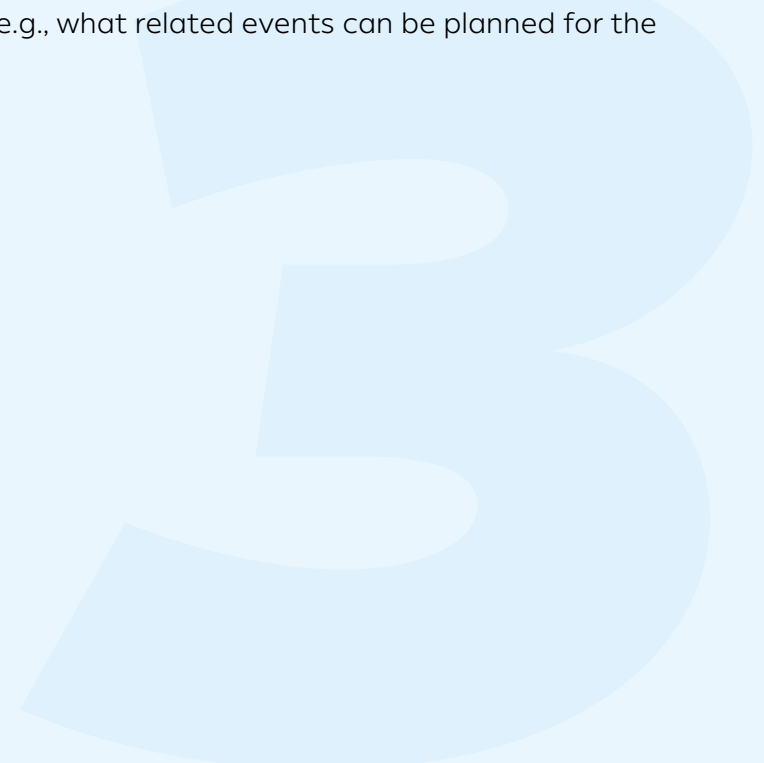
- acceptance of the project idea by the whole team
- gathering inspiration and merging ideas from partners input to further develop the project idea
- assigned roles for Reviewer and External Expert

Participants:

- Project Owner
- Project owner organisation team members

Example & Tips:

- A Project Proposal sheet completed as a result of a well-planned internal project meeting not only serves as an excellent guide, but also as a perfect foundation for developing a well-rounded proposal. For example, the information gathered from the meeting can be expanded on and presented to a potential exhibition financier. The milestones defined in this meeting can also serve as a kind of memo to the participants and an excellent starting point for a future brainstorming session about the project – e.g., what related events can be planned for the exhibition?



4. RESEARCH, INSPIRATION

Purpose:

- finding studies/statistics/reports/articles and other sources of inspiration for the project
- examining similar EU projects

Output:

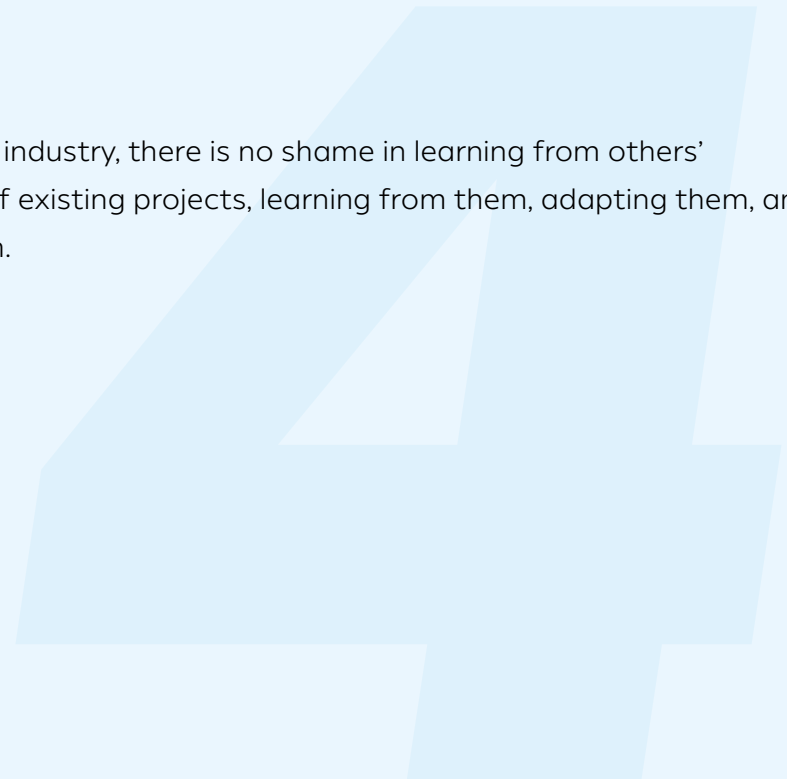
- the need for the project is clear and fits within the framework of a respective call
- relevant and useful resources saved for later use in the application writing phase
- the project idea is ready to be baselined in detail
- benchmark analysis

Participants:

- Project Owner
- Reviewer
- Optional: External Expert

Example & Tips:

- While having a unique, creative idea is essential in the art industry, there is no shame in learning from others' experiences. Thus, research is essential for being aware of existing projects, learning from them, adapting them, and even developing our own ideas in collaboration with them.



5. IDENTIFY STAKEHOLDERS

Purpose:

- identifying all of those who are affected by your work, who have influence or power over it, or have an interest in its successful or unsuccessful outcome
- prioritizing the stakeholder groups

Output:

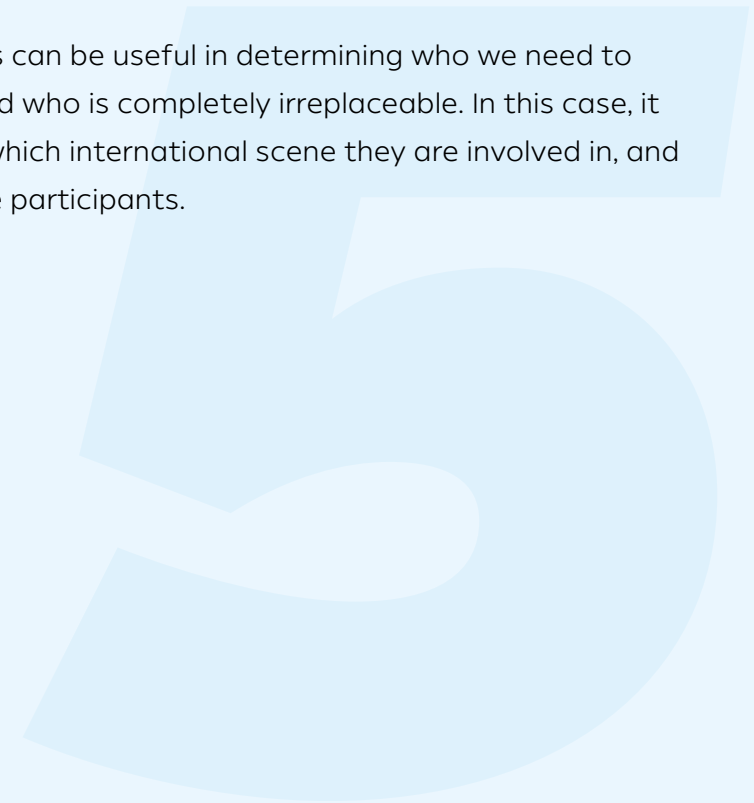
- list of identified stakeholders

Participants:

- Project Owner
- Reviewer
- Optional: External Expert

Example & Tips:

- Continuing with the exhibition example, listing the stakeholders can be useful in determining who we need to contact, who is more difficult to persuade into cooperation, and who is completely irreplaceable. In this case, it is critical that we also consider where the target artist works, which international scene they are involved in, and whether there is a professional conflict of interest between the participants.



6. IDENTIFY EXTERNAL/ASSOCIATED PARTNERS

Purpose:

- selection of relevant partners based on the project objectives

Output:

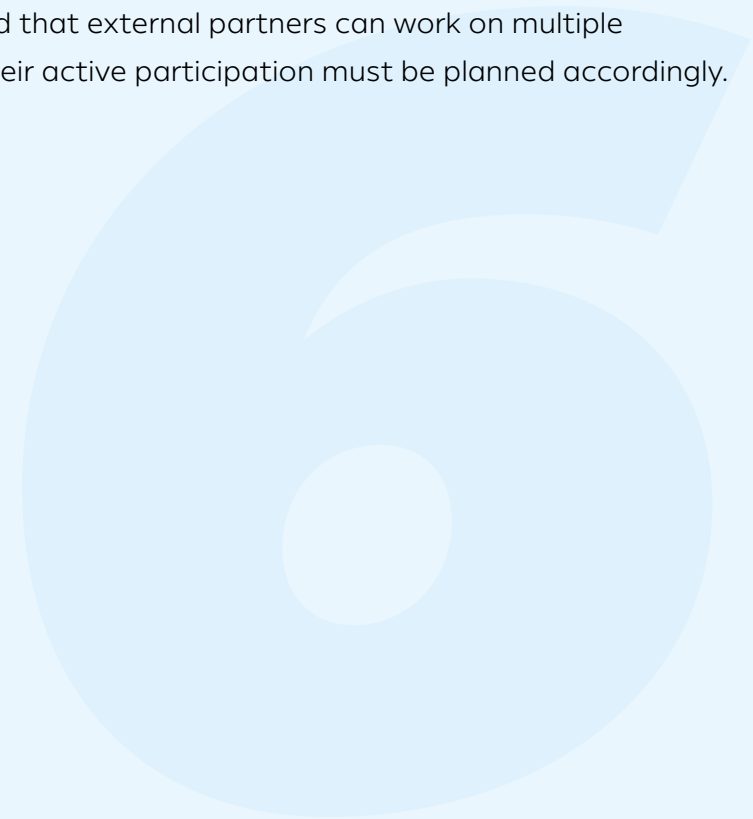
- list of potential project partners

Participants:

- Project Owner
- Reviewer
- Optional: External Expert

Example & Tips:

- The evaluation of external partners should be given special attention during the project's initial phase. Don't forget to account for any contractual processes. It should also be noted that external partners can work on multiple projects at the same time, so the tasks in which we anticipate their active participation must be planned accordingly.



7. NEED ASSESSMENT/INTEREST ANALYSIS

Purpose:

- understanding the key stakeholders' needs
- discovering how the key stakeholders feel about your project and working out how to best engage them, and communicate with them

Output:

- relevant and useful resources saved for the application writing

Participants:

- Project Owner
- Reviewer
- Optional: External Expert

Example & Tips:

- This is essentially a second round of research. Communication is the foundation of effective collaboration. For issues affecting multiple people, a joint questionnaire can be used, followed by a 1-1 interview-style conversation tailored specifically to the given partner. At first glance, this may appear as a waste of time, but during such a survey, things may come to light that can have a significant impact on the project's outcome.

8. PROJECT PROPOSAL DRAFT

Recommended artefact

- [Project Proposal \(link\)](#)
- www.miro.com - a virtual tool used for visualizing the project design

Purpose:

- creating a proposal draft that can be sent to the partners
- including all compulsory elements in the proposal (see template)
- double-checking to make sure the proposal aligns with the call's objectives and selection criteria

Output:

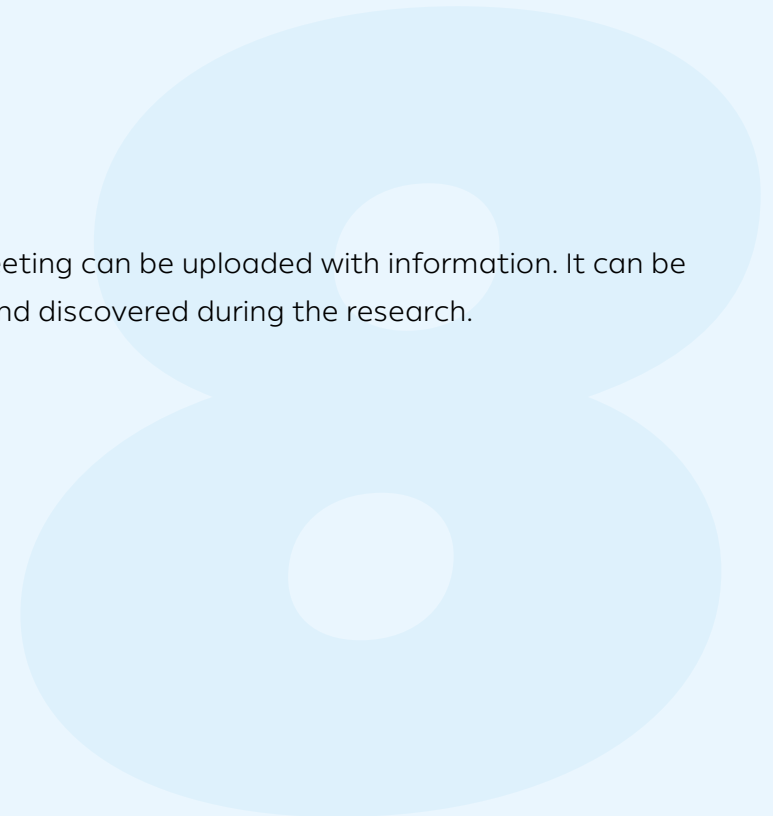
- a well-structured, comprehensible proposal that lays down the foundation of the project in a way that is clear and appealing to every potential partner

Participants:

- Project Owner
- Reviewer
- Optional: External Expert

Example & Tips:

- At this point, the Project Proposal presented at the internal meeting can be uploaded with information. It can be supplemented with information obtained from collaborators and discovered during the research.



9. PROJECT LAUNCH MEETING WITH PLANNED PARTNERS

Recommended artefact

- [Project Proposal \(link\)](#)
- www.miro.com for the project design visualization

Purpose:

- joint brainstorming session with the planned partners
- reviewing the Project Proposal together, and modifying it if needed

Output:

- acceptance of the Project Proposal

Participants:

- Project Owner
- Reviewer
- External Expert
- Planned partners
- Optional: other members of the project owner team

Example & Tips:

- Getting to know your partners is crucial for the success of the project, especially in the case of a larger partnership. During an exhibition, for example, it is important that the exhibiting artist and the event's press have been acquainted and are in communication with one another. At the same time, it is essential that the actors meet the people in charge of project administration so that they know who to contact if they have any questions.

10. FINALIZED PROJECT CONCEPT WITH CONFIRMED PARTNERS

Recommended artefact

- [Project Proposal \(link\)](#)
- www.miro.com – virtual tool for visualizing the project design

Purpose:

- After collecting inputs from the planned partners, the Project Proposal is ready to be finalized
- The core concept should be fully finalized, ideally, without requiring any major modifications after this stage
- Identifying any associated partners that could supplement the partnership (involvement of the partners' international network)

Output:

- finalized Project Proposal document
- finalized project concept
- project Owner is ready to begin the application writing process

Participants:

- Project Owner
- Partners

Example & Tips:

- By this phase, the planning should have reached a point where certain elements of the project are fixed. As important as it is to leave room for flexibility and the possibility for modifications along the way, certain elements of the project must be fixed at this level, in order to prevent the project from stalling. This way, individual stakeholder can also make headway with their tasks if they stick to the agreed terms. The organization of the delivery of the exhibition cannot begin until the location, date, budget, etc. have been determined.

11. PREPARATION FOR APPLICATION WRITING

Recommended artefact

- [Tips Document](#). It serves as a gathering place of all information relevant for the project application writing. It has no sample document. However, application writers can easily initiate the process by generating an empty document. Within this document, they can begin compiling useful links and materials aimed at helping them in crafting the project proposal. The document's purpose is to serve as a central hub for accumulating links and information, that can be developed tailored to the writers' preferences.
- [Partner Information Form \(PIF\) \(link\)](#)

Purpose:

- defining roles and responsibilities before the application writing process begins (role of Project Owner, Reviewer, External Expert, Partners and other Project Owner team members involved)
- preparing the knowledge base with the team, collectively walking through all the application questions, taking notes and gathering tips for each question.
- sending PIF to partners (adding additional questions if needed)

Output:

- roles and responsibilities are clearly defined before the collaborative application writing process begins
- a knowledge base for all the questions in the application form is prepared
- PIF is sent and filled out by all partners

Participants:

- Project Owner
- Reviewer
- External Expert
- Partners
- Project Owner team members

Example & Tips:

- There is no sample document available here, as it is very specific to every project. The point is to collect all necessary information from the project participants and partners in one place, which serves as a kind of idea-driven knowledge base. It is similar to the research and inspiration phase, but here we no longer expect inputs from the external stakeholders, but rather from the inside. It is worth using these documents online, where they can be edited collaboratively and the partners can add any further input, even after the meeting.



12. APPLICATION WRITING

Recommended artefact

- [Tips Document](#) (knowledge base)

Purpose:

- pre-application writing meeting: the Project Owner and the Reviewer walk through the application form, discuss the most important points and prepare for the writing process (according to the predefined roles)
- close and continuous collaboration between the Project Owner and the Reviewer throughout this process
- Project Owner: main coordinator and decision-maker during the writing process, she/he can accept or decline the reviewer's suggestions
- Reviewer: gives valuable feedback to the Project Owner: spotting errors AND offering concrete solutions; CAREFULLY reviews the PO's work and proposes better solutions that the PO can either accept or decline
- Managing Director: The organisation's manager can also play an important role during this stage, such as following the application writing process, taking any necessary corrective actions, and providing support in critical questions (e.g.: budgeting). It should not be forgotten that the organisation's CEO is usually not the same as the project's owner. There are times when both of their perspectives are required.

Output:

- application reaches an 'almost ready to submit' phase
- only a few minor changes/improvements are needed

Participants:

- Project Owner & Reviewer = in close and continuous collaboration
- Managing Director
- Optional: External Expert and Partners

Example & Tips:

- It's a good idea to hold a meeting at this phase, with the purpose of sharing thoughts about the application status in order to finalize the document. The meeting should be captured in the knowledge-base document, which can be used as a summary to help with the proposal writing process but also as an excellent resource for finalising the Project Proposal Document.

13. REGULAR CONSULTANCY WITH PARTNERS

Purpose:

- walking through the critical points of the application and the project's milestones (*)
- seeking advice from partners when needed
- final touches – making any necessary changes or minor adjustments
- identifying potential risks at this stage
- agreeing on the final version

Output:

- acceptance of the application by all partners
- reaching a consensus among all partners regarding major aspects of the project

Participants:

- Project Owner
- Reviewer
- External Expert
- Partners

Example & Tips:

- Continuous contact throughout the application writing process is essential for ensuring that the relevant stakeholders are up-to-date on all current information. The list of participants for such meetings and any corresponding communication processes must be carefully selected in order to prevent any potential interruptions in the project launch due to a lack of information.

14. PROOFREADING AND TECHNICAL CHECKS

Purpose:

- the proof-reader is responsible for thoroughly reading the entirety of the application, spotting any errors such as spelling, grammar, inconsistency etc.
- making any necessary final adjustments
- final technical checks on the application platform

Output:

- double-checked, proofread application

Participants:

- Project Owner
- Proof-reader (someone with no prior knowledge of the project that can provide read the application with a completely objective lens)

Example & Tips:

- It is highly recommended that the final version of the proposal is checked by someone who is not an active part of the project and is able to review it objectively as an external observer. In such cases, certain errors may be revealed that the involved participants may not have even considered. This can be an essential step in finalizing the form.

14

15. FINAL CHECK BY PARTNERS

Purpose:

- To ensure that partners are fully aware of the tasks assigned to them and agree to the submission of the application

Output:

- fully reviewed application is ready to submit

Participants:

- Partners

Example & Tips:

- If possible, a written confirmation from all partners signalling their approval of the application can be collected at this stage. It is important to collect written feedback as well, because it is not guaranteed that everyone will be comfortable sharing their thoughts verbally, especially in front of others. As art projects are often interdisciplinary, with people from various fields collaborating, feedback and willingness to provide honest input can be especially sensitive.

15

16. SUBMISSION

Purpose:

- Project Owner submits the application (recommended time: at least 1 day before submission deadline)
- Project Owner sends the submitted application to partners

Output:

- Application submitted and sent to partners

Participants:

- Project Owner

Example & Tips:

- The most important thing is not to leave anything to the last minute. We all have the tendency to underestimate the time of our tasks, therefore it's a good practice to account for inevitable setbacks, such as issues that still need to be solved, information received from a partner that is incomplete or needs correction, etc. It is recommended that you allow for twice the estimated time planned for the final finishing touches and to time the completion at least a few days before the deadline.

16

PLANNING PHASE

The workflow then moves on to planning. The planning phase focuses on converting the objectives into a concrete, achievable plan. The project's scope is clearly defined, and the tasks to be completed are listed, but risks are also highlighted at this stage. [Risk Management Meeting Document \(link\)](#) and options are developed, and a work schedule is established. In practice, this encompasses all activities that are no longer in the initiating phase but cannot yet be classified as being in the implementation phase. A series of planning and re-planning sessions are carried out in order to achieve the best possible balance of the project's resources, objectives, and constraints. As an example, in the case of organizing an exhibition, the main task is to plan all of the elements that support the fact that the exhibition actually takes place. At this stage, the concept of the exhibition is already defined and the main collaborators have been identified. This is where the budget is estimated, potential risks are identified, and the important tasks ahead are worked out in detail. The goal is to create documents that serve as a kind of precise map for the project participants who will work on the implementation.

As you may have noticed in the previous section, we will go over all the defining levels of the planning phase in the following section. We also reveal the project stakeholders involved in some way with each given step. We consider the purpose of each process step as well as the corresponding documents that support and improve the efficiency of the (re)design phase. The reader can refer to the provided examples and tips that correspond with the content of each given step.



PLANING PHASE

1. GRANT & CONTRACT RECEIVED FROM FUNDER

Purpose:

- If the project is selected, we step from the initiating phase to the planning phase

Output:

- selected project
- contract
- grant

Participants:

- Project Manager

Example & Tips:

- Our project has been selected. It is important to be aware that we are one step closer to implementation. The project is therefore entering a new phase, which requires a new attitude.



2. INFORMATIONAL EMAIL I. TO PARTNERS

Purpose:

- Once the contract is received, we send out the first informational email to the partners with some compulsory elements:
 1. submitted application
 2. evaluation of the application
 3. next steps & deadline
 4. creating a shared folder, which will serve as a repository during the project

Output:

- all partners are informed about the project selection and the required next steps
- clear, logical shared folder system is established

Participants:

- Project Manager

Example & Tips:

- You should be aware that everyone has the e-mail address they use and check regularly. If you're working together with artists and creators, it's a good idea to find out what communication channel they use, or which is the most intuitive. It's important to note that the widely used chat interfaces (such as Whatsapp) cannot form the basis of an official correspondence, since it is much more difficult to send and receive documents. Themmatization of e-mails and the creation of appropriate recipient groups is also a crucial organizational step. It is worth devoting more time to the planning of communication processes from the very beginning, so that you can build a framework that promotes effective communication, rather than hinders it.

3. ONLINE MEETING WITH ALL THE PARTNERS

Purpose:

- informing partners, refreshing memories about the project
- getting to know each other better

Output:

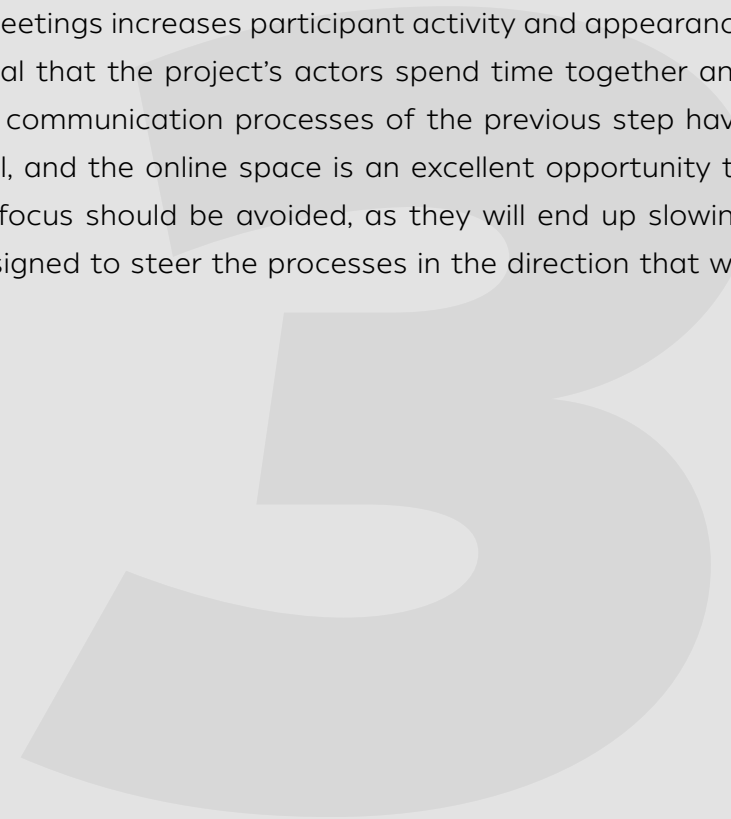
- all partners meet online for the first time

Participants:

- Project Manager
- Project Partners

Example & Tips:

- The proliferation of virtual platforms for professional communication is one of the positive outcomes that emerged in the last three years. Adapting the use of hybrid and online meetings increases participant activity and appearance frequency. For the work processes to run smoothly, it is critical that the project's actors spend time together and develop a relationship. This is particularly important until the communication processes of the previous step have been consolidated, so getting to know each other is essential, and the online space is an excellent opportunity to ensure this. However, too many meetings without a specific focus should be avoided, as they will end up slowing progress and stunting efficiency. These meetings must be designed to steer the processes in the direction that will lead to a real product being realized.



4. ONE-TO-ONE MEETINGS WITH THE PARTNERS

Recommended artefact:

- [Project Work Plan \(link\)](#): Its purpose is to provide a summary of the project schedule with the most important details. It also allows you to manage parts of the project that run concurrently yet have the same subtasks. The facts are transparently displayed in the form of a list, but there is also room for textual explanation.
- [Task Matrix \(link\)](#): This is a large, summarizing document that allows you to see the individual subtasks and all their important properties in one place. The Task Matrix can be extremely useful in observing the outcomes of multiple tasks running in parallel in a system.
- [Organigram \(Stakeholder Matrix\) \(link\)](#): This table can be described as a modern detailed phone book containing nearly all the relevant data from all partners (including both external and internal partners, as well as project stakeholders). Contact information for all actors involved in the project is easily accessible, and responsibilities and project roles are summarised in this document.
- [Financial Package \(link\)](#): This document covers all financial aspects of the project. It should be noted that this is a sensitive document, and access rights should be handled with caution. In many cases, this document serves as the foundation for the financial report required at various stages of the project.
- [Project Handbook \(link\)](#): This document is mainly intended for PARTNERS. The goal is to provide an easy-to-understand handbook for all the management processes of a project. It is important not to go into too many details, instead focus on what the partners have to do, when and how. It is worth adding a content table. Check the contractual obligations - use them as a starting point (to avoid unnecessary efforts). It is important that this is a comprehensive document, so at the fourth stage of planning it is not certain that we will be able to include everything in the most precise way, but at the end of the planning stage it is present as a very important output. As a result, rather than leaving it until the end of the planning phase, it is worth updating and filling it as you go.

- [Project GPS \(link\)](#): Everyone is probably familiar with the concept of online clutter. It is often inconvenient when we need to retrieve documents from e-mails or when a logical but unfamiliar folder system throws obstacles in our path. The Project GPS document functions as a compass, collecting all the links used in the project (ones both directly and indirectly related to the project). This document, however, should not be overlooked; it must be updated on a regular basis, so that, for example, can be used for onboarding new colleagues.

Purpose:

- clarify any questions that may have come up since the first meeting
- sharing the 1st version of the project artefacts

Output:

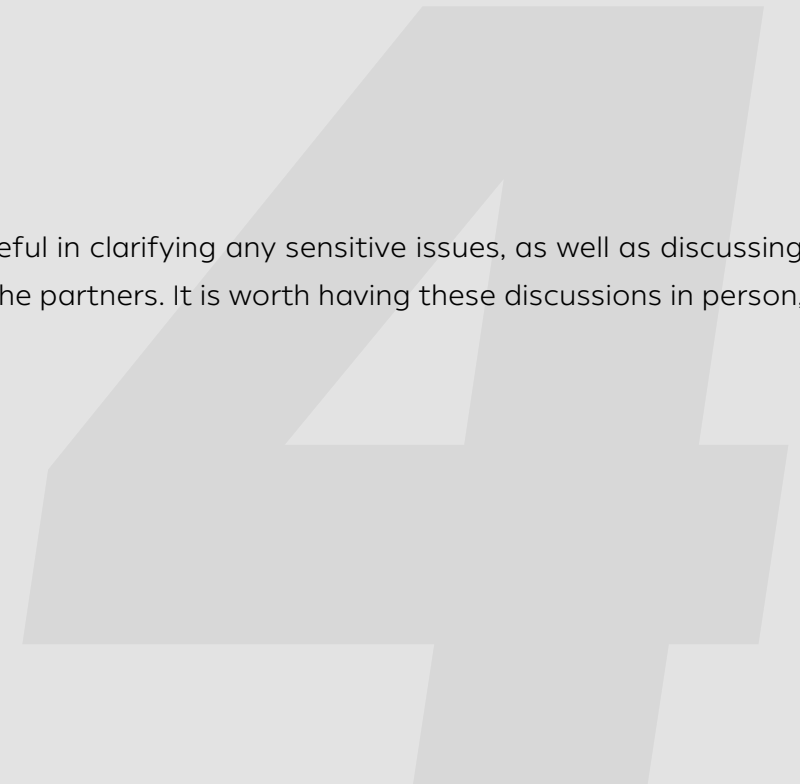
- common understanding of the project
- project documents reviewed
- the partner understands his/her role in the project

Participants:

- Project Manager
- Project Partners

Example & Tips:

- Holding one-to-one meetings with partners can be very useful in clarifying any sensitive issues, as well as discussing questions and doubts regarding the relationship between the partners. It is worth having these discussions in person, in order to create a more confidential atmosphere.



5. INTERNAL PLANNING MEETING

Purpose:

- If needed, the Project Manager organizes a meeting with the organization asking for feedback and advice before kicking off the project

Output:

- Project Manager is ready to kick-off the project

Participants:

- Project Manager
- The organizations' team

Example & Tips:

- We cannot emphasize enough the importance of regular meetings both in person and online. The role of the project manager is to create an atmosphere in which the participants can approach each other with confidence. The project can only be successful with the strong efforts of teamwork.



6. ONLINE PRE-KICK-OFF MEETING WITH PARTNERS

Purpose:

- Before the project officially starts, an online pre-kick-off meeting is organized with all partners in order to:
 1. understand the project's baseline
 2. discuss any questions
 3. clarify the project aims
 4. set the success factors
 5. discuss the kick-off agenda
 6. go over travel details

Output:

- detailed agenda of the offline(?) Kick-off meeting
- review the general tasks and objectives

Participants:

- Project Manager
- Project Partners

Example & Tips:

- It is necessary to clarify the points and the joint tasks where the partners will have to cooperate. It is important that the project manager does not get lost in the details or begin to micromanage, but rather is able to entrust tasks to sub-managers. This is also important so that the overall strategic supervision of the project is not compromised.

7. FINALISING THE PROJECT ARTEFACTS & FINANCIAL TOOLS

Recommended artefacts:

- [Project Work Plan \(link\)](#)
- [Organigram \(Stakeholder Matrix\) \(link\)](#)
- [Project Handbook \(link\)](#)
- [Outsourcing Plan \(link\)](#): This will be unique to every project; the particularities of the project determine whether an outsourcing plan is needed. Among the documents of the applied [PM² Methodology \(link\)](#), there is an element designated for this. Here, you can record who is responsible for the task, who is the contact person for the external procurement etc.
- Communication Strategy: The project's communication strategy can have a large influence on the project's overall outcome. Because this is such an important aspect of the tasks' smooth implementation, the related and recommended documents should be prepared with great care.
 1. [Communication Checklist \(link\)](#): This document aids in keeping track of the required and recommended elements of the project's visual appearance, such as the logo and font used.
 2. [Communication Guideline \(link\)](#): This guideline will assist you in effectively communicating about the project throughout the duration. This is a summary of the communication rules and activities that must be followed in order to keep stakeholders informed of the project's whereabouts.
 3. [Communication Monitoring Document \(link\)](#): gathers and tracks all forms of (online and offline) communication.
 4. [Project Introduction Basic Information \(link\)](#): This is a brief informational document about the project including all the elements that must be communicated. It can be distributed to journalists or to internal and external project stakeholders involved in communication tasks.
 5. [Project Introduction Template \(link\)](#): This presentation provides a unified view of the project and its processes. As a result, it is critical that stakeholders use consistent communication throughout the the entirety of the project. After making sure all participants have access to the template, we will assist them in maintaining a consistent project image.

[Task Matrix \(link\)](#)

[Financial Package \(link\)](#)

[Project GPS \(link\)](#)

Purpose:

- tailoring the project artefacts to the project's needs
- creating new project artefacts, if necessary
- finalize the project work plans
- artefacts should include at least an [Organigram \(Stakeholder Matrix\) \(link\)](#) and a [Work Plan \(link\)](#)
- creating the Communication Package: [Communication Checklist\(link\)](#)
[Communication Guideline \(link\)](#)
[Communication Monitoring Document \(link\)](#),
[Project Introduction Basic Information \(link\)](#)
[Project Introduction Template \(link\)](#)
- finalizing the [Financial Package \(link\)](#)

Output:

- all artefacts created, ready to be sent to partners

Participants:

- Project Manager
- Communication Manager
- Financial Manager



8. INFORMATIONAL EMAIL II. TO PARTNERS

Purpose:

- Project Manager sends another informational email to the partners containing:
 1. all the finalised project artefacts
 2. final date and agenda of the kick-off meeting

Output:

- Partners have all the project artefacts

Participants:

- Project Manager
- Project Partners



9. INFO MAIL III. TO PARTNERS

Purpose:

- Project Manager sends the Grant Agreement (from funder) and the Cooperation Agreement (created by the project leader) to the partners

Output:

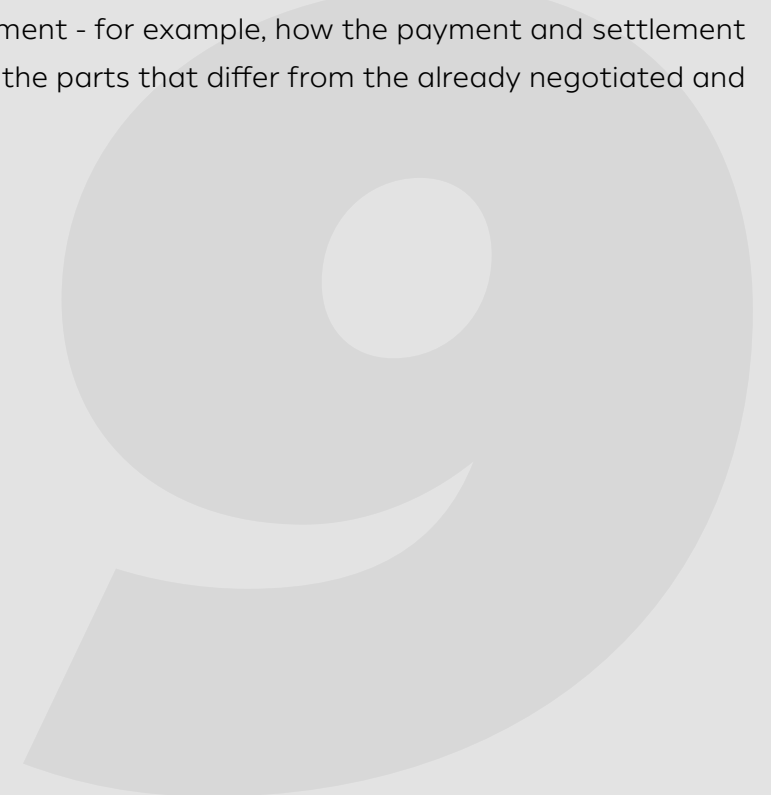
- partners receive all contracting information

Participants:

- Project Manager
- Project Partners

Example & Tips:

- The real commitment is made upon signing the contract, which marks the beginning of the official cooperation. This e-mail should therefore summarize the key points of the agreement - for example, how the payment and settlement process will take place. It is strongly recommended to highlight the parts that differ from the already negotiated and known bianco contract.

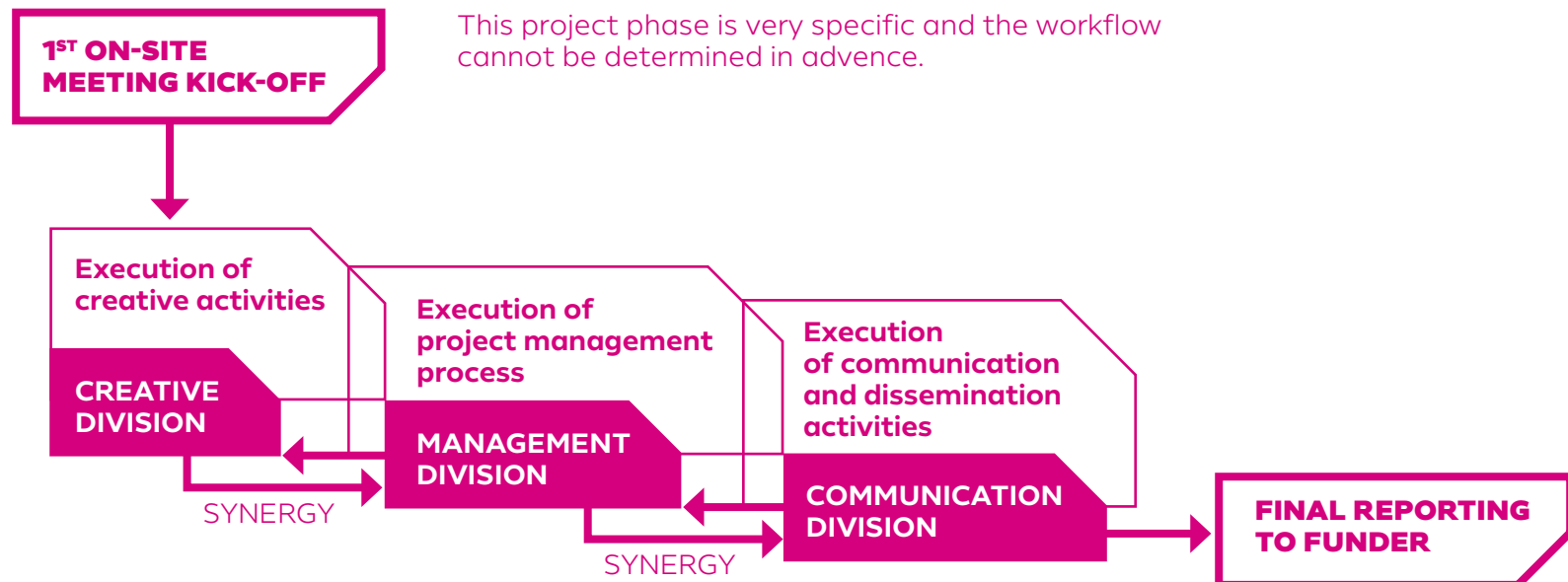


EXECUTING PHASE

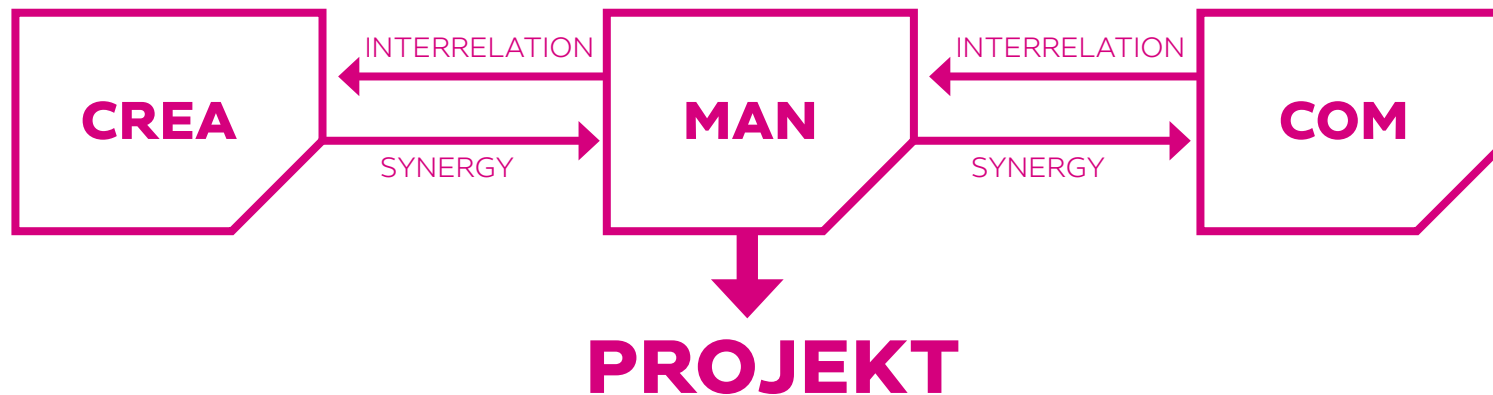
During the implementation phase, the project team is actively involved in the work. The project manager directs the team's efforts. At this point, it is critical to manage conflicts, because as time passes and the project submission deadline approaches, everyone involved will become increasingly tense. Quality assurance is also very important at this stage. By the end of the implementation phase, the goal is to produce (permanently or temporarily, depending on the acceptance plan) the project's products in accordance with the project applicant's expectations. The products of the project are created in accordance with the project plan as the section's closing chord.

The reader is guided through the implementation phase by two key graphics. However, it is important to note that this section is very project specific; ready-made methods are difficult to define. For example, a completely different plan of action is required for the realization of an exhibition, the accreditation of a new art education, or the creation and smooth operation of an international cultural student festival. As a result, we are now demonstrating a strategic framework with a new visualization tool, which can make the implementation phase much easier on a systemic level.

THE SECTION'S CENTRAL FIGURE



DETAILED DESCRIPTION OF THE WORKFLOW



THE DIVISIONS

The executing phase can be divided into three major dimensions based on the activity focus. Synergies between dimensions influence activity processes within each dimension; therefore, the system of connections should be investigated at the start of the implementation phase.

CREA – CREATIVE DIVISION:

- Execution of creative activities

MAN – MANAGEMENT DIVISION:

- Execution of project management processes
- Project management processes are usually divided into two parts:
 1. Mandatory management processes – contractual obligations to funder
 2. Internal management processes – complements mandatory processes

- **Recommended artefacts:**

[Project Tracking Log \(link\)](#)

[Project Progress Evaluation Form \(link\)](#)

[Hosting Info Pack \(link\)](#)

[Meeting Agenda \(link\)](#)

COM – COMMUNICATION DIVISION:

- Execution of communication, dissemination and exploitation activities
- **Recommended artefacts:** [Communication Package: Communication Checklist \(link\)](#)
[Communication Guideline \(link\)](#)
[Communication Monitoring Document \(link\)](#)

The following documents, mostly supporting control, can aid in the smooth management of the execution phase:

Recommended artefacts:

Use once during the process:

- [Project End Evaluation Form \(link\)](#): This document focuses on the satisfaction of the partners involved. It focuses on the detection of overall project success and effectiveness of project management. It evaluates what the project added to the participants' knowledge base and what overall benefits can be attributed to the project.

Use repeatedly throughout the process:

- [Hosting Info Pack \(link\)](#): This document is especially useful when the implementation phase requires travel. For example, it's possible that the exhibition is located outside of the center, or that the project includes a trip to a foreign event. This document contains all detailed information about the organization of the trip and hospitality.
- [Meeting Agenda \(link\)](#): This document has a double function: it serves as a meeting agenda and as a minute of meeting note. It can be an excellent document to distribute to participants prior to the meeting so that they can prepare themselves by seeing the meeting's planned topics. Following that, it allows for post-meeting follow-up.
- [Meeting and Event Evaluation Form \(link\)](#): This document is intended for collaboration. The goal is to collect feedback following the meetings. It is critical that the management team consider the responses. We strongly advise using online form creators to increase response rates. The form could be tailored by selecting the appropriate questions.
- [Project Management Evaluation Form \(link\)](#): The essence of this document is to monitor the project management process along given indicators. These indicators are:
 1. A clear division of tasks between the partners
 2. A clear work plan and timetable is available
 3. All partners are aware of the main goals and expected results
 4. There is a clear distribution of responsibilities among the partners

5. There is an agreed decision-making procedure; each partner gets his/her say
 6. The methods of communication between partners are agreed upon and regular communication is arranged
 7. Contributions made by the partners are valued and taken into consideration
- **[Project Progress Evaluation Form \(link\)](#)**: The purpose of this form is to provide feedback on the project's progress based on the following indicators:
 1. The timetable has been respected
 2. The sub products are ready and approved
 3. Planned activities have taken place
 4. Communication was efficient and effective
 5. Partners have contributed accordingly to what was stated in the work plan
 6. The goals of the first year have been met
 7. The partners have learned from each other
 - **[Project Tracking Log \(link\)](#)**: The Project Tracking Log is a record of project events and actions concerning risks, changes, issues, and decisions. It monitors the overall progress of the project. Risks and issues are identified, and changes and decisions are documented. It assists project stakeholders in gaining an overview of the entire project progress from start to finish, better managing risks and issues, and keeping track of project changes and decisions. It also serves as a source of information for the final report.
 - **[Teamwork Evaluation Form \(link\)](#)**: This is the assessment of the preconditions for effective collaboration. The outcomes of this form serve as an important foundation for team building. If one of the conditions is not met, collaboration may face greater difficulties. This evaluation can be performed at the start of the project to aid in planning, during the project to monitor and improve teamwork, or at the end of the project.

Examples & Tips:

- At the beginning of the project, during the planning phase, it is important to establish with your partners who should fill in the forms and at what intervals.

CLOSING PHASE

During the project's closing phase, the finished products are officially handed over, entrusted to the care, supervision, and control of the project owner (PO), and the project is administratively closed. The project's closing meeting is held, and all processes are completed, allowing the project to be officially closed. Following completion of the work, there are two critical steps to take: On the one hand, it is critical to take a moment to recognize your efforts, as the success of the project could not have been achieved without it. Another critical aspect of the closing phase is lesson learning. What did we learn, and what will serve as a guideline for our next project? We've provided a diagram for the final stage (found below), in which we'll take a look at the most important tasks of the closing process.



1. LAST ON-SITE MEETING WITH THE PARTNERS

Recommended artefact:

Lessons Learned (link): Keep in mind that this document is for INTERNAL USE ONLY and should be based on the content of the Evaluation Forms. The primary goal of this document is to provide an overall assessment of the project experience in order to increase the likelihood of future project success. It is assumed that the lessons learned, best practices, and post-project recommendations will be provided. The lessons learned document serves as a historical reference and aids the memory of the organisation, partners.

Purpose:

- discussing possible continuation of the project
- collecting feedback from partners
- final evaluation of project experience
- preparation for reporting

Output:

- in-depth analysis of project successes and hardships and the reasons behind it
- future perspectives discussed
- 'lessons learned' have been archived
- ready for reporting tasks

Participants:

- All partners

2. FINAL REPORT & ADMINISTRATIVE CLOSING FOR FUNDER

Purpose:

- all relevant information collected from partners to be able to submit the final report (contractual obligation)

Output:

- final report submitted

Participants:

- Project Manager

3. LAST ONLINE MEETING & CELEBRATION

Purpose:

- celebration

Participants:

- All partners

Summary

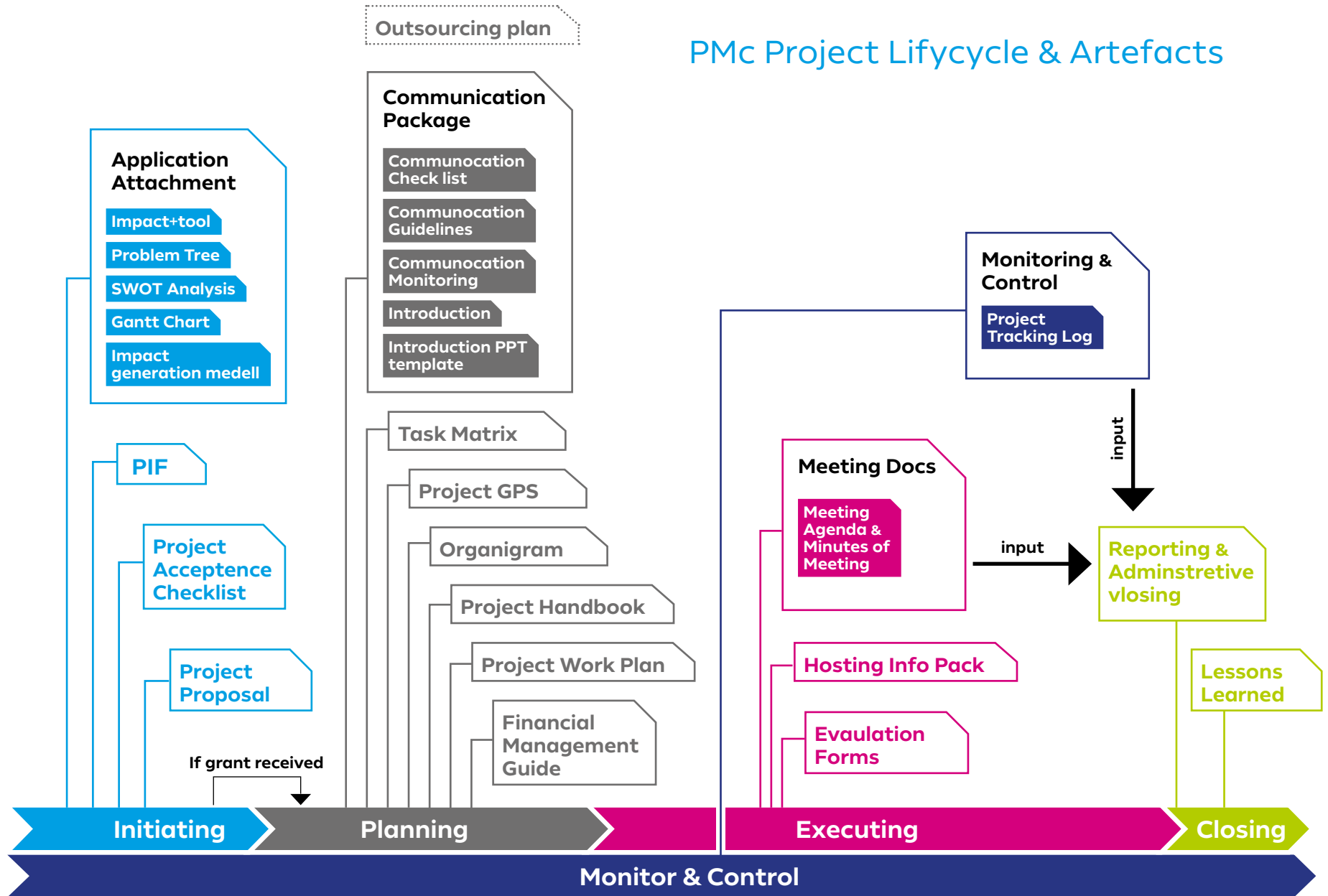
A project is similar to a work of art. It can come in a variety of shapes and sizes. There are those that we create on our own and those that we create as a result of group work, or as a community. There are some that take only a few hours to complete, while others take weeks or even months. The reason for their creation can also vary greatly. There are works created for charity and works created for profit by the creator, but there are also works made entirely for self-serving entertainment. No two works of art are alike, and no two projects are alike. There are, however, prepared, professional, experienced, and conscious creators. The methodological framework gathered here, as well as the documents belonging to the individual phases, assist managers of art and culture in implementing creative and cultural industry projects with the greatest artistic sensitivity and business accuracy. The project book provides a solid structural foundation and concrete documents that are useful in practice, but it also allows for customization. The main advantage of the documents created here is their adaptability and customization. We provide the user with a series of documents in this book so that the project's own chapter can be prepared with care and adapted to the project.

On behalf of the creators, we wish you a successful project! We would appreciate it if you could share your thoughts with us, as well as any projects that were supported by the guidance of this book!

Dr. Galla Daniella Dominika

galla.daniella.dominika@mome.hu

PMc Project Lifecycle & Artefacts



Relevant literature

- [The PM2 Methodology](#)

- [Dobie, C. \(2020\). A Handbook of Project Management: A complete guide for beginners to professionals. Routledge.](#)

- The basic scope of this book includes the processes and techniques used in each of the project management functions by which a project manager delivers projects. The book includes templates that will help you put these principles into practice in the workplace.
- This book will attract to both beginner and advanced users. We especially recommend it to project managers in any industry.

- [PMBOK® Guide \(2021\)](#)

- A Guide to the Project Management Body of Knowledge is a critical resource for effective project management in any industry. This updated edition presents 12 project management principles as well as eight project performance domains that are critical for the successful delivery of project outcomes.
- This, like the previous source, is a beginning project management book that provides a non-specific, industry-independent insight into the project management toolbox. And the most recent edition considers the economic, technological, and social changes that have occurred.

• [Wu, T. \(2020\). Optimizing Project Management \(1st ed.\). Auerbach Publications.](#)

- By balancing and blending competing methodologies and broad principles, processes and practices, and the need to understand versus the need to apply, this book aims to provide an optimized view of project management.
- This book is primarily aimed at professionals with prior experience in project management, so it is a more advanced read.

• [Kerzner, Harold. Project management metrics, KPIs, and dashboards: a guide to measuring and monitoring project performance. John Wiley & Sons, 2022.](#)

https://books.google.hu/books?hl=hu&lr=&id=XDiMEAAAQBAJ&oi=fnd&pg=PA1&dq=project+management+tips&ots=PEN6LVMWF2&sig=V4sWRZJaLIbOUDLuZi_fiUmpfZO&redir_esc=y#v=onepage&q=project%20management%20tips&f=false

[NEM JÓ A LINK!!!](#)

- A completed project is not synonymous with a successful project. Measurability is also established as part of the project management process. It is critical to determine at the outset of the project what tools and methods will be used to make the project measurable.
- As a result, the book provides insight into a subset of project management. The book is not only for those who are interested in numbers.

• [Alvarenga, J. C., Branco, R. R., Guedes, A. L. A., Soares, C. A. P., & e Silva, W. D. S. \(2019\). The project manager core competencies to project success. International Journal of Managing Projects in Business.](#)

- Several decades of research have revealed a link between the success of a project and the competencies of the project manager who coordinates it. The study sheds light on what qualities are required for successful project work through empirical research. The authors surveyed project managers on the importance of 28 project manager competencies to project success. Univariate and multivariate procedures were used to analyze the data.
- Whether we participate in a process as a project employee or as a project manager responsible for HR issues, it is critical to understand what qualities are required of a project manager to ensure success.

Appendix

We have included links to all the recommended documents that you may need during the project in the appendix. We organized the links by individual chapters for easy retrieval. It is essentially a summary table of the methodology, which can be printed out and taken as an everyday guide to follow.

The methodology

- [The PM2 Methodology \(link\)](#)

The workflow

INITIATING PHASE

- [Project Acceptance Checklist \(link\)](#)
- [Project Proposal \(link\)](#)
- [Project Meeting Rules \(link\)](#)
- [Project Meeting Checklist \(link\)](#)
- [Project Meeting Guidelines \(link\)](#)
- [Partner Information Form \(PIF\) \(link\)](#)

PLANNING PHASE

- [Project Work Plan \(link\)](#)
- [Task Matrix \(link\)](#)
- [Organigram \(Stakeholder Matrix\) \(link\)](#)
- [Financial Package \(link\)](#)
- [Project Handbook \(link\)](#)
- [Project GPS \(link\)](#)
- [Outsourcing Plan \(link\)](#)

[RISK MANAGEMENT MEETING DOCUMENT \(LINK\)](#)

COMMUNICATION PACKAGE

- [Communication Checklist \(link\)](#)
- [Communication Guideline \(link\)](#)
- [Communication Monitoring Document \(link\)](#)
- [Project Introduction Basic Information \(link\)](#)
- [Project Introduction Template \(link\)](#)

EXECUTING PHASE

- [Project End Evaluation Form \(link\)](#)
- [Hosting Info Pack \(link\)](#)
- [Meeting Agenda \(link\)](#)
- [Meeting and Event Evaluation Form \(link\)](#)
- [Project Management Evaluation Form \(link\)](#)
- [Project Progress Evaluation Form \(link\)](#)
- [Project Tracking Log \(link\)](#)
- [Teamwork Evaluation form \(link\)](#)

CLOSING PHASE

- [Lessons Learned \(link\)](#)

Additional useful resources

- www.miro.com
- [Impact Generation Model \(link\)](#), [Impact+ Exercise Table \(link\)](#)
- [Problem Tree \(link\)](#)
- [Gantt Chart \(link\)](#)
- [SWOT Analysis \(link\)](#)



PM²
Management