

Exhibition and Project Planning Workbook



Create beyond category.

I recommend printing out this workbook, taking notes in the margins, and writing down any questions and ideas that come to mind as you work through it.

Exhibition and Project Planning Workbook

Introduction

If you've ever written a grant application and found yourself staring blankly at the budget section, you're not alone. Or maybe you have an art installation idea, an exhibition idea, or want to build out a community activation project, and you are having a hard time figuring out all the pieces to the puzzle. What do I need to know, and what do I need to do, in order to get it off the ground from idea to reality?

Many artists are taught how to make compelling work, write artist statements, and document their practice. Far fewer are taught how to plan exhibitions or facilitate larger projects from beginning to end.

After working with artists, galleries, festivals, artist-run centres, public art programs, and non-profit organizations across Alberta for over a decade, I've noticed the same challenges appear again and again. Artists often know how to imagine and envision a desired outcome for a large-scale project, but haven't yet been given the toolkit to estimate the steps and stages it might take to bring that vision into reality.

I have designed this workbook to help unpack and understand some of the important considerations to review and plan for when developing a project or exhibition.

An Encouragement and Disclaimer

Try not to let this workbook make you feel overwhelmed. I say that because it can't and won't answer all of your questions. In fact, it will probably lead you toward more questions, and that's okay, and usually quite necessary.

One of the biggest misconceptions about exhibition planning, grant writing, and professional arts practice is that experienced artists somehow have all the answers and know everything. I'll let you in on a little secret: most professionals are also figuring things out along the way, even those who have decades of experience. What experienced artists and arts workers often have is a growing toolkit of resources: a network of relationships, a variety of skills built through trial (and probably lots of error!), and questions they have learned how to ask.

My hope is that this workbook helps you begin to see some of the scaffolding that exists behind various kinds of creative projects. That it can begin to help you understand what supports are needed to bring an idea into the world.

As you move through these pages, you may discover gaps in your knowledge. That's not a sign that you're unprepared, but rather, that you're learning. In my mind, art is nothing if not a lifelong journey of learning and curiosity. I have outlined the contents here to help you notice what tools, skills, and conversations are going to best support the projects that matter most to you.

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Part 1: Project Vision

Creative projects often *evolve* and very rarely have full clarity from beginning to end. And so, being practical while visioning a project idea is like thinking about what ingredients and cookware you might need before you enter the kitchen to prepare a meal. Know what you're cooking, gather what you need, and leave room for surprises - that's how you can learn to *cook* your creative ideas from ingredients to something you'd be proud to share with others.

Reflecting on the questions below, you can use page 4 of this workbook or a separate notebook to jot down thoughts or ideas, or you can record a voice-note. I recommend spending at least half an hour or so with these questions, as they will help you immensely. Any art or creative project is a *story* and cannot be told meaningfully without some internal "storyboarding" and contemplation. You will refer back to these notes (written or voice) throughout your project, so it is important to keep them close.

What Are You Striving for? What Clarity Do You Need?

- What is the central idea of this exhibition/project?
- Why does this project matter to you right now? What is its significance for you personally, and how might it be an invitation for others to enter into your world in a way that may prompt meaningful conversation or learning?
- How many artworks do you want to include? Why is each one important and how does it contribute to the overall project?
- Are the works already completed, partially completed, or not yet started?
- If not all artworks are complete, what resources do I currently have available that I can utilize to complete these works? What resources do I still need to source?
- What experience do you want visitors/viewers to have?
- What would success look like to you? (This one is important! It clarifies a lot of what further questions you may need to ask and answer to get there - see next point).
- What questions do I have now that I still need to answer for me to fulfill my project?
 - Which questions can I research myself?
 - What skills do I already have? What skills do I need support with?
 - In areas I may need support - how can I request support and labour professionally while being conscious of time and costs?

Best Practice Note: When requesting support, ask for *service quotes* up front. Some may be willing to offer support in-kind, or may agree to trades - but it is best to ask outright and outline what support you are looking for in detail, so that it gives everyone an opportunity to know if they have capacity in time and resources to effectively help out. Outline the project and then a simple request is enough - something like: "*Hello! I am working on X project and [fill in details of what you've completed and what you want help with] Is this a service you offer? If you have capacity to support a project like this right now, could you please provide a quote or estimate for this work?*"

This protects both you and any service providers from unexpected workloads, builds rapport and trust, and will help you to understand what budget items to anticipate and plan for in grant applications or working out strategies to fund your project.

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Project Vision Note-Writing

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Part 2: Logistics + Cost Considerations

Material Considerations

- Do I know what materials will be needed to complete this project?
- Do I have all the materials? If materials are still required, where might they be sourced from and is there anywhere I can source them freely or cheaply?
- Are any of the materials toxic? What considerations do I need to be mindful of to ensure this project and its materials are handled safely?
- Do I have all required personal protective equipment (PPE) to properly protect myself in the studio to work with the materials that will be used?

Space Considerations

- Where will the final exhibition or project take place?
- How large is the venue?
- What kinds of walls, floors, ceilings, or outdoor conditions exist?
- Are there accessibility considerations?
- Are there rules or restrictions for materials or content?
- Will public visitors interact with the work? Or is it private/ticketed?
- Where will I build or develop all of the components of this exhibition or project?

Budget Considerations

Before we start actually listing expenses in *Part 4: Building a Realistic Budget*, this Budget Considerations section simply walks you through some important prospective areas to think about in your exhibition or project. While many of us may not enjoy this part, I've built out some questions and systems in my own toolkit that I use for every project to help me not to stumble up against unanticipated costs.

This staged section is not here to convince you that your project will include every item on this list, as most projects don't. Instead, think of these prompts as a way to uncover questions or costs you may not have considered yet. Some categories may not apply to your project at all, while others may reveal opportunities to seek support from a venue, collaborator, grant program, or a community partner.

Remember: *Plan for the ingredients, gather the tools, and you can leave room for the messiness and evolution of creativity.*

Let's start with the question: What needs to happen *first* for your project to take shape? This is where it is helpful to think about your project in stages.

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Reflections before thinking through stages of your project

Rather than trying to estimate every cost immediately, start by asking:

Which of these stages actually apply to my project? Which stages am I already equipped to handle realistically? Which stages might require additional research, funding, or support?

Work through each of these stages, and put a checkmark beside the items you already have figured out, or cross out things that you don't need to factor into your project goals. Write down costs already incurred for items you've checked off, as this remains part of your project budget. If there are items on these lists you still need, that is where you'll begin itemizing your budget outline in *Part 4: Building a Realistic Budget* if you need to make one for any grant applications, or to determine where or how you will fund your project plan.

Stage 1: Making the Work

What do you need in order to create the artwork itself?

- ☐ Materials (list what materials and art supplies you need or already have.)
- ☐ Equipment (list what tools or equipment you need or already have.)
- ☐ Studio Space
- ☐ Fabrication Support: ex. construction, welding, mold-casting
- ☐ Prototyping / Testing

Stage 2: Preparing the Work for Display

What needs to happen before the work is ready to share with others?

- ☐ Printing
- ☐ Framing
- ☐ Mounting
- ☐ Documentation
- ☐ Packaging

Stage 3: Getting the Work There

How will the work travel from your studio to the exhibition? Some options include:

- ☐ Transportable by transit / personal vehicle (is it small enough? How much does that cost?)
- ☐ Shipping/Courier if not in the same city or you cannot source personal transportation
- ☐ Vehicle Rental
- ☐ Friend-family-community network supports for driving to/from
- ☐ Art Handler

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Stage 4: Presenting the Work

What will help visitors experience the work? ***Ask yourself: Does the venue provide these? OR am I responsible?

- ☐ Labels
- ☐ Signage
- ☐ Lighting
- ☐ Pedestals
- ☐ Audio / Visual Equipment

Stage 5: Inviting People In

How will people learn about the exhibition?

- ☐ Graphic Design invitations (Canva offers a great way to do this on your own) Usually it is good to plan for the following visuals:
 - Eventbrite banner
 - Instagram Invite (can be a slide carousel post, or a reel - depending on what you prefer)
- ☐ Promotional captions - include where, when, what, and a Call to Action (Get your tickets at X link, or Save the date!)
 - Send out a ticket link AT LEAST two weeks before the event to give people enough time to register. Price tickets based on similar events and what is offered at the event.
- ☐ Printing & Advertising - If you have budget to print or hand out advertisements you can:
 - Print at home small handouts on regular printer paper, cut them out, and leave on buses and community boards (cheapest option!)
 - Order Postcards a month in advance (so you don't have to pay for rush printing and shipping) and distribute to community spaces at least two weeks in advance
- ☐ Opening Event - What do you need to host? Food? Alcohol License? Catering?

Stage 6: Supporting the Project

What helps the project run smoothly behind the scenes?

- ☐ Insurance
- ☐ Bookkeeping - How am I keeping track of my receipts and costs?
- ☐ Grant Writing
- ☐ Contingency Funds

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Logistics + Cost Considerations Note-Writing

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Part 3: Questions to Ask Host Organizations

If your project or exhibition is going to be hosted by an organization, this section is worthwhile to review. Never assume, you can *always* ask, because every venue operates differently, and every organization has different internal resources and structures for carrying out their programming. Try to answer these questions from information on their websites where possible, but you can ask an administrator if you can't find an answer that you need.

Fees & Funding

- Is there an artist fee / exhibition fee that will be paid to me from the venue? OR is this structured as a venue where I pay to rent the space and exhibit?
- Are travel costs / mileage to and from the venue covered? Are meals and accommodations covered if it is at an out of town venue? Usually, if you are being *invited* as a guest exhibiting artist by an institution that has annual budgets for this kind of thing - that would be the kind of context you'd ask this. If it is a small not for profit or community space - most do not have budget for this, but will usually bring it up if they do.

Installation

- Who installs the work?
- Are technicians available?
- Are tools provided?

Promotion

- Who writes promotional materials? If I do, will the host re-post or share with me?
- Who manages social media?
- If I am responsible for this - are there communications rules or regulations from the host about logo usage, crediting, or branding guidelines?

Documentation

- Will the exhibition be professionally photographed by the host organization?
- Can artists access those images afterward?
- If no documentation is provided by the host, do you know anyone who may want to? Again - ask about if they have capacity and how much it might cost for them to do so.

Insurance

- Is artwork insured while onsite?
- During transportation?
- During installation?

Clear answers on these various considerations prevent a lot of difficult conversations down the line and create a streamlined flow for your creative project to unfold.

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Part 4: Building a Realistic Budget

Many artists underestimate costs because they only budget for things they have already purchased, and it can be harder to project what costs may come up, until they surprise you.

Try thinking about your budget in stages as well, similar to Part 2: Logistics + Cost Considerations. Oftentimes, each of the different stages of a project may be eligible for different grants or funding opportunities, depending on the description of eligible projects or expenses.

Stage 1: Making the work.

Stage 2: Preparing the work for display

Stage 3: Getting the work to the venue

Stage 4: Presenting the work professionally

Stage 5: Inviting people to experience it.

Stage 6: Supporting the Project

Making the Work		
Item	Description	Cost

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Preparing the work for display		
Item	Description	Cost
Getting the work to the venue		
Item	Description	Cost

Presenting the work professionally		
Item	Description	Cost
Inviting People to Experience the work and Other Project Support		
Item	Description	Cost

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Part 5: Reality Check Questions

Before submitting your proposal or grant application, or proceeding with hitting the gas pedal on a project, ask yourself these questions:

- ☐ Have I identified all *major* expenses?
 - ☐ Have I received quotes where necessary?
 - ☐ Have I included a contingency amount?
 - ☐ Have I budgeted/planned for transportation?
 - ☐ Have I budgeted/planned for installation?
 - ☐ Have I budgeted/planned for documentation?
 - ☐ Have I considered accessibility needs?
 - ☐ Have I clarified what the venue will provide?
 - ☐ Have I accounted for my own labour?
 - ☐ Have I identified areas that could scale back, pivot, or shift if funding is reduced or I am unable to source funding at all?
-

Final Thoughts

Exhibition and Creative Project planning can feel overwhelming because you're trying to imagine a future that doesn't exist yet. That is absolutely normal, and let me tell you - *EVERYONE* - regardless of skill or experience, experiences moments of pause before beginning creative labour because of this.

The goal of this workbook cannot and will not eliminate uncertainty. However, it can replace a few unwanted surprises with a list of things to keep in mind, offering a helpful toolkit to consider the creative path forward. Every question answered now creates more room for creativity later.

Good luck, and remember: You don't need to know everything before you begin. You only need to begin gathering your ingredients, materials, and tools so that you can *Do the Art Thing*.