

# How to Plan a Collaborative Project

... in four easy steps

This short guide aims to provide museum professionals and university academics with tips for planning a collaborative project across the sectors. From thinking of your project idea to developing a project plan that suits each partner, this guide offers advice on how to avoid the pitfalls of partnership and reap the rewards of collaboration.

## 1. Getting started

At the beginning of every great collaborative partnership is a great idea. So, first things first – think of a project idea that you are really excited about. Next, make sure that it fits well with your own organisation’s mission. Then draw up a list of people who might be able to help you carry the project idea through to fruition: these might include stakeholders (museum visitors, schools, researchers), collaborators (museums, academics, academic departments, community groups), and funders.

Once you have a short project proposal and a sense of some of the people who could be involved, then you are ready to contact potential project partners and pitch them your idea. It is at this point that your project idea may have to be open to change, depending on the input of a potential project partner. Most collaborations involve a merging not only of resources but also of ideas and being flexible can be a great help to this process of exchange and decision-making.

## 2. Setting the ground rules



Communications Men string telephone wire onto a tree, US Department of Defense

At the beginning of a collaborative project it is important to set down on paper what each partner wants to achieve, how much time or resources they are willing to commit to this end, and by which date they expect to complete the project. This may seem very formal and unnecessary when you have established a good personal relationship with a partner, but it is the best way to avoid misunderstanding. On the whole, people are very eager to make a collaborative project work and in their effort to smooth the way for it to progress, it is common to overlook the details of the arrangement – which can lead to disappointment or disagreement further down the line. Experience tells us that setting the ground rules from the beginning through a **Memorandum of Understanding** can minimise the chances of a misunderstanding and, consequently, build strength and longevity into a

collaborative partnership. It is important to note, however, that a Memorandum of Understanding is not a legally binding document. It is more that the process of writing such a document helps each partner to think carefully about what they want from the project and how they expect it to run – any significant differences in opinion will be revealed through the drafting, while there is still time to change direction. We are producing a guidance paper on Memorandums of Understanding that will include templates that you can adapt for your own use – these will be available in the Summer of 2013.

### 3. Developing a project plan

Once the project partnership has been established, time can be well spent on developing a project plan. Again, whilst onerous, the process of getting ideas onto paper can unearth unseen difficulties and give project partners time to assess potential risks and put in place important precautions. At this stage, it is particularly helpful to outline a detailed but realistic timetable, scheduling regular face-to-face meetings between project partners and opportunities for reflection on the project's challenges and progress. Finally, building in a contingency budget of around 10% of your total expenditure is highly advisable. Project planning with partner institutions or individuals helps to build new networks, even if you don't find funding for this particular project – it is a useful process in and of itself.



Wood Badge Staff Development, 1962  
Szentkiralyi

### 4. Learning lessons

It is important to remember that the outcomes of a project also include the learning that takes place during the project management phase and after the project has completed. Many people who have participated in cross-sector collaboration have done so many times, bringing their past experiences to future collaborations. If we can convert this accumulation of personal experience into a change in wider-sector approaches to collaborative partnership then real progress can be made. So, it is really important to capture the learning from one project and make sure it informs your next project planning process and also to share this experience with others.

The best way to ensure that lessons are learned from a project is to implement a thorough evaluation process from the beginning of the project. For many, the word 'evaluation' can trigger bad memories of hundreds of feedback forms, but it does not have to be that way. In fact, much evaluation fails to gather answers to the most important questions. Thinking clearly at the project planning stage about which questions you would most like to answer and then considering the best methods to capture this information will lay the foundations for an insightful evaluation of a project's impact.

Tips for museums seeking academics	Tips for academics seeking museums
<b>Ensure</b> that your project idea supports the museum's strategic aims	<b>Consider</b> ways in which your project idea could result in tangible benefits for the museum
<b>Draw up</b> a list of stakeholders, potential collaborators and funders	<b>Draw up</b> a list of stakeholders, potential collaborators and funders
<b>Draft</b> a short project proposal (which is open to change) to send to potential project partners	<b>Draft</b> a short project proposal (which is open to change) to send to potential project partners
<b>Use</b> a Memorandum of Understanding to record aims, objectives and responsibilities at the start of the project	<b>Use</b> a Memorandum of Understanding to record aims, objectives and responsibilities at the start of the project
<b>Invest</b> time in thorough project planning, building in contingency	<b>Invest</b> time in thorough project planning, building in contingency
<b>Ensure</b> that lessons learned in one collaborative project inform future ventures and share best practice	<b>Ensure</b> that lessons learned in one collaborative project inform future ventures and share best practice
<b>Ask</b> the right questions in order to collect useful answers through a planned and specific evaluation process	<b>Ask</b> the right questions in order to collect useful answers through a planned and specific evaluation process