

Planning

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Why plan?

Planningⁱ is a process of thinking ahead and trying to establish the best way of proceeding in order to achieve particular ambitions or goals. It is sometimes easy to think that planning is unnecessary or even impossible – that there are so many things that are beyond your control that planning anything is a waste of time. But thinking things through and planning carefully is one of the best ways of taking command of a situation or project. Of course there will be things that will remain beyond your control and these have the potential to influence what you do in both positive and negative ways, but if you have spent time thinking about what you want to do and how best to do it you are in a better position to counter negative influences and respond to positive ones. Planning also helps to ensure that you make best use of your skills and time. If you have thought a project through in advance you are less likely to encounter unforeseen problems or have to waste time going back to rectify mistakes.

You can **plan for the long-term** – looking say five years ahead, deciding where you would like to be, what you would like to be doing and how you would like to be doing it in five years time

You can **plan for the short-term** – looking at a particular project or piece of work and deciding how to go about making it happen.

In either case the planning process should begin well in advance of whatever it is you want to do. It can help to start the process of planning by asking yourself some basic questions:

- What do I want to do?
- Why do I want to do it?
- How long is it likely to take?
- What relevant information do I already have?
- What other information might I need?
- What external factors will influence my plan?

It is worth taking some time to think through your responses to these questions. There are no “right” or “wrong” answers, but they will help you to think through what it is you want to do.

The templates here have been designed to help you think through a “long-term” plan such as a key phase of your career and a short-term plan such as a project or specific piece of work.

The templates are downloadable, but they include links to sources of additional information that can help you through the planning process so it may help to view them online first.

Long Term Planning Template

Try using this template if you are at the start of your career or considering a significant change in career direction. Situations of this kind can be rather daunting as you feel very much as if you are facing the unknown.

Spending time trying to clarify and focus your thoughts can help to allay fears and can help to break down what seems like an impossibly large period of time into more manageable chunks.

When planning long term, your thoughts and ideas for the end of the period in view are inevitably going to be more vague and uncertain than those for the beginning of the period. Don’t worry about this.

Making a Start	
Key questions to ask yourself	<ul style="list-style-type: none"> • What am I doing now? • What would I like to be doing in three/five years time? • What skills and knowledge do I have? • What additional skills/knowledge will I need in order to get to where I want to be?
Who can help?	<ul style="list-style-type: none"> • Are there specific courses/training programmes that I should take to increase my skills/knowledge base? • Is gaining relevant experience more of a priority than formal training – if so how should I go about it? • What sources of support and advice are out there that I can make use of? (Dance UK, Foundation for Community Dance, Artists Development, CDET, ANDAⁱⁱ colleagues, friends, the Internet)

Deciding on a timescale	<ul style="list-style-type: none"> • Is three/five years a realistic timeframe to get to where I want to be? • Do I know anyone who has achieved something similar – how long do they feel it took them?
Can I afford it?	<ul style="list-style-type: none"> • Are there any cost implications if I pursue this course of action? If I am not sure, how might I find out? • Will I have to work for lower rates of pay than I might otherwise achieve in order to gain relevant experience? • What are courses/training programmes likely to cost? Are there any sources of funding to which I can apply to support me? • If I get to where I want to be are my earnings going to be significantly higher? Or lower?
Tracking your progress	
How will I know if I am getting there?	<ul style="list-style-type: none"> • Try to review your progress at least annually to see if you feel you are moving in the direction that you want to go in. How much work have you done that has provided you with relevant experience? Have you enjoyed it? Is this course of action still the one you want to take? Are you surviving financially? Talk to friends and colleagues and seek their views on how you are doing • If you think things are not going well, decide how long you will give yourself before you change direction and try something new • If an unforeseen opportunity that deviates from your plan comes up – take it, providing you are clear about your reasons for doing so. You can always reschedule your plan, or change your mind. Be prepared to embrace the unexpected if it feels right
Documentation	<ul style="list-style-type: none"> • Keep relevant paperwork in good order. Make notes in the early stages of the planning process and look back on them to check how you are doing, keep a regularly updated list of useful contacts, keep certificates from any training courses in good order and accessible, regularly review and update your CV so that it reflects your growing range of skills and experience.

Short Term Planning Template

Try using this template if you are planning a project, particularly if you are taking lead responsibility for a project for the first time.

The template is divided into three sections:

- Before – i.e. those things to think about and plan well in advance of the actual project commencing
- During – i.e. simple systems to help keep the project on track whilst it is happening
- After – i.e. evaluation and reflection

The “Before” section is the longest – the more advanced planning you do, the easier and more straightforward it is to manage the practicalities of a project.

The “After” section demonstrates that planning is a cyclical process with the knowledge gained during one experience feeding into whatever it is you want to do next.

Before the Project	
What key internal factors (things about me) do I need to take into account?	<ul style="list-style-type: none">• What do I want to do?• What relevant past experience and knowledge do I have?
Key external factors (things outside me) do I need to take into account?	<ul style="list-style-type: none">• Who do I want/need to work with? (performers, artistic collaborators, venues)• What sources of support and advice can I make use of? (Dance UK, Foundation for Community Dance, Artists Development, ANDAⁱⁱⁱ colleagues, friends, the Internet)

<p>Deciding on a timescale</p>	<ul style="list-style-type: none"> • Have I done anything like this before? If so, how long did it take me last time? • How many other people does it involve? What impact might their schedules have on what I want to do? • What sources of funding^{iv} might I want to apply for and what are the deadlines for these? • How far ahead will I need to approach venues?
<p>What is this all going to cost?</p>	<ul style="list-style-type: none"> • As soon as you have an outline project in place draw up a budget^v. • You will need to add to and revise this as your plans develop. Before the project kicks off make sure you have a balanced a realistic budget that you can stick to through the project. • If you do not have a business account, open a separate bank account for the project
<p>During</p>	
<p>What can I do to help keep things on track during the project?</p>	<ul style="list-style-type: none"> • Checklists – keep a running list of things to do, tick things off when they are done and whenever you tick a task off ask yourself: “if I have done that, what do I need to do next”? • Contact lists – keep an up to date list of the contact details (name, phone number, address, email, fax) for all those involved in the project – from the creative team through to funders. Keep notes of any significant conversations that you have • Contracts – if you are engaging performers, designers, etc. issue a written contract so that there is a clear understanding between you about what it is you expect the other to do. Similarly make sure there are contracts for any performances, education work, etc. with the hosts for that work
<p>How do I keep track of the finances?</p>	<ul style="list-style-type: none"> • Stick to your budget. Regularly review how income and expenditure are going and make adjustments so that the budget remains balanced throughout the project. Do not overspend on the assumption that you may get more income than you thought – you probably won’t • Establish simple but effective methods for keeping track of expenditure and income • Ensure that you have adequate funds in your account to pay people promptly
<p>After</p>	
<p>Evaluation and review</p>	<ul style="list-style-type: none"> • How did it go?

	<ul style="list-style-type: none"> • What went well? • What might I handle differently next time? • What have I learnt?
Documentation	<ul style="list-style-type: none"> • Record the outcomes of evaluation^{vi} to inform future practice. This could be in the form of a report or video diary. File all your paper work – budgets, contracts, contact lists – so you can refer to them next time.

ⁱ See <http://www.culturalenterpriseoffice.co.uk/resources/planning> and <http://www.mindtools.com>

ⁱⁱ Visit the links page on <http://www.workindance.com> for details

ⁱⁱⁱ Link to relevant sites – see ii above

^{iv} See <http://www.artscouncil.org.uk> – information and publications/guide to alternative funding opportunities

^v See sample budget section in ‘Downloads’ on <http://www.workindance.com>

^{vi} Visit <http://www.culturalenterpriseoffice.co.uk/resources/evaluation>

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