

ARTS IN DIGITAL SPACES SERIES

OPEN VOICES

PHASE 4 WORKBOOK



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WELCOME!

TO THE ARTS IN DIGITAL SPACES PHASE 4 WORKBOOK

This Workbook, and its corollary content in Teachery, will be your guide through this project. The subsequent consulting sessions with your Phase 4 cohort will walk through this document to ensure that all participants have a both a broad conceptual understanding of this digital work, and minute details that will propel the success of the project forward.

WHAT'S IN THIS WORKBOOK?

- **Notes & Resources - pg. 6**
 - a collection of resources that should guide most any digital project and that can be accessed at any time during or after the project. This includes helpful reference material, tutorials, and outside resources from expert practitioners.
- **Setup & Strategic Planning Guides - pg. 7-14**
 - Visioning tools: *Mind-mapping, Strategic Priority Dot Matrix (to take back to your Board)*
 - Goal-setting: *expected outcomes of projects - the "WHY" of this project*
 - Prioritization of outcomes - *High/Low Graph for allocation of resources*
 - Context - *where this project meets the rest of your digital goals*
- **Process outline & checklist - pg. 15-23**
 - Did we secure all necessary rights?
 - Who needs to be involved? *Do-ers, supporters, Board members, artists*
 - Which assets are necessary? *Photos, video, space/venues*
 - What do I need to learn/practice? *Building/enhancing skills*
 - What is the timeframe? *Setting and meeting deadlines*
 - Who will be my "editors?" *Finding meaningful feedback from valued stakeholders*
- **Get Going - Lessons for your project**
 - The individual project plans for *Building Online Presence, Creating Virtual Events, Creating New Programming, Building a Website, and Fundraising* will be "Lessons" available on **Teachery**, an online learning platform, accessed for free.
- **Ready to Launch!**
 - Final Checklist
 - Press PLAY!
- **Final Project Assessment**

WHAT YOU'LL GET OUT OF THIS WORKBOOK

THE AIM OF THIS WORKBOOK IS TO TAKE A DREAM PROJECT FROM SCRATCH TO IMPLEMENTATION.

To do that, we'll need to make sure that the project fits the overall goals of your organization/art.

You will:

be able to articulate your goals to stakeholders.

better allocate resources by prioritizing projects.

understand this project in the context of your overall digital strategy.

understand the process of building digital work into your overall organizational work by naming the elements necessary for success.

build a timeline for steps of your project.

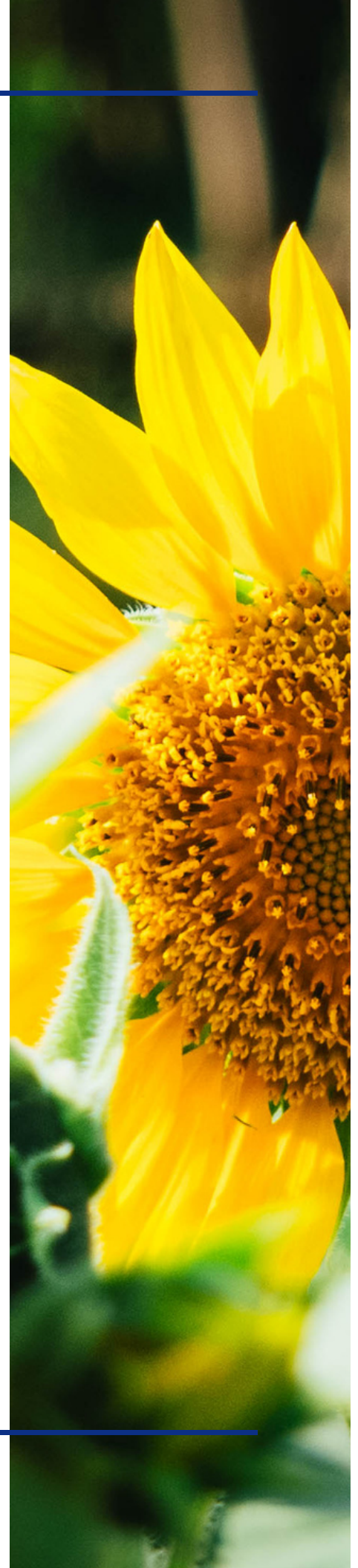
identify skills that need to be built/enhanced in order to complete the project, and the resources to help advance those skills.

create a checklist of key components of your project, working through that checklist to completion.

develop and **review** useful metrics for evaluation of each step of the project, and the project as a whole.

assess your capacity for following this process for future projects.

launch or **implement** your project.



OPEN VOICES TEAM MEMBERS



Adam Reinwald is a nationally recognized vocal chamber artist and conductor, and is in demand as a coach and strategist for small- to mid-size arts organizations, focusing on new media and virtual/digital branding. Adam combines artistic and administrative leadership from over two decades of experience in the nonprofit arts sector. See more at openvoicesllc.com



Sara Langworthy Ph.D., is a creative communications consultant with years of experience in video production and public speaking. Sara specializes in helping her clients better understand and engage with their online audiences by creating meaningful virtual events and productions. Sara has extensive speaking experience and often presents keynotes and training sessions in both virtual and in-person spaces. She is also an author, podcaster, and singer. Connect with Sara at www.developplayllc.com



A Minneapolis-based conductor, guitarist and consultant, **Brian Dowdy** currently serves as Artistic Director and Principal Conductor of the Minnesota Philharmonic Orchestra and Journey North Opera Company. As a citizen artist, Brian is committed to building stronger, more equitable communities through performance, education and the amplification of diverse artistic voices. More at briandowdy.com



Katherine Castille Katherine Castille is an arts professional with two decades of marketing, communications, and fundraising experience, who knows that working in the arts means being an educator, advocate, and storyteller. She is a soprano soloist in the Minneapolis/St. Paul area and member of the prestigious National Lutheran Choir. Connect with Katherine on [LinkedIn](https://www.linkedin.com/in/katherinecastille/).

COHORT SESSIONS

BRIEF DESCRIPTION OF ACCOMPANYING GROUP SESSIONS



**STRATEGY AND SETTING
SMART GOALS**
SECTIONS 1-3



**CHECKLISTS &
MODULES**
TEACHERY



**READY TO
LAUNCH**
REVIEW + DISCUSSION

Your cohort will buoy your efforts during these sessions, and could turn into valuable collaborators along the way. Seek out their counsel and expertise where possible.

Your Open Voices team lead will provide guidance and consultation on your project, while facilitating the group-learning conversations that make this Phase unique.

SECTION 1 - NOTES & RESOURCES

Much of this workbook draws inspiration and structure from the **Video Your Way Workbook**, built by Sara Langworthy for DeveloPlay LLC. More at <https://www.developlayllc.com/videoyourway>

FREE resources on **Digital Space Best Practices, Creating Virtual Events, Website Checklist**, and much more at bit.ly/ArtsInDigital

For Section 2 of this Workbook: More at www.mindmapping.com on the structure and science of this exercise. If this is process you want to expand on, here's a great online tool: <https://www.mindviewonline.com/map>

Additional virtual Dot Voting links: <https://miro.com/online-whiteboard/> and <https://draw.chat/index.html>

For Section 3 of this Workbook:

Synchronization (Sync) License information:

<https://www.ascap.com/help/career-development/How-To-Acquire-Music-For-Films>

<https://www.easysonglicensing.com/pages/help/articles/music-licensing/what-is-a-synchronization-license.aspx>. (NOTE: this is not a recommended VENDOR, but the information herein is helpful.)

<https://www.digitalmusicnews.com/2020/01/30/what-is-sync-licensing/>

<https://www.digitalmusicnews.com/2015/05/25/a-simple-guide-to-signing-the-best-sync-deal-possible/>

For Theaters:

<https://www.playbill.com/article/live-streaming-rights-made-available-to-amateur-and-school-productions-facing-cancellations-in-the-wake-of-covid-19>

<https://www.playscripts.com/help/rights>

For Photos/Visuals:

<https://www.diyphotography.net/photo-licensing-look-basics/>

SECTION 2 - VISIONING & GOAL-SETTING

Before we zoom IN to all the details of your project plan, we want to zoom OUT--to *the 30,000 ft level*--to get some clarity and understanding around how this project fits within your larger strategy and goals. The aim here is to get “dreamy” about all the fantastic “what if’s” about your online presence. Think big, and then...**think bigger!**

In completing this next part, it may help to consider imitating some of your favorite “web oases.” We’re going to get in touch with some terms of emotion here, so feel free to allow your most descriptive language to come forward. *Courtesy developlayllc.com, Video Your Way workbook.*

STEP 3 YEARS INTO THE FUTURE: WHAT DOES YOUR ONLINE PRESENCE LOOK LIKE, ASSUMING MONEY AND TIME ARE NO OBJECT?

WHAT DO YOU WANT PEOPLE TO UNDERSTAND ABOUT YOU/YOUR ORGANIZATION AFTER VISITING YOUR WEBSITE?

***WHAT IS ENERGIZING FOR YOU ABOUT WORKING ON YOUR WEBSITE?
WHAT MOTIVATES YOU WHEN YOU THINK OF BUILDING YOUR ONLINE PRESENCE/WEBSITE?***

VISIONING & GOAL-SETTING

Personality: *Describe the way you want people to feel when they come to your website and/or watch one of your videos.*

I want people who come to my website to feel:

Resources: *Describe what resources or materials you want people to find when they come to your website. Get specific!*

I want people who come to my website to find:

Action: *Describe what actions you want people to take when they visit your website and/or watch one of your videos (Share? Download? Buy?)*

I want people who come to my website to:

Goal Statement: *The goal of my online presence is to...*

VISIONING & GOAL-SETTING

Great!! It's not always easy to put a Goal Statement into words, but we hope that clarified some things for you. Now that you've established the goals of your online presence, we'll get to work on how to accomplish those goals. Here are two techniques for continued "dreaming" about the work you'll do...

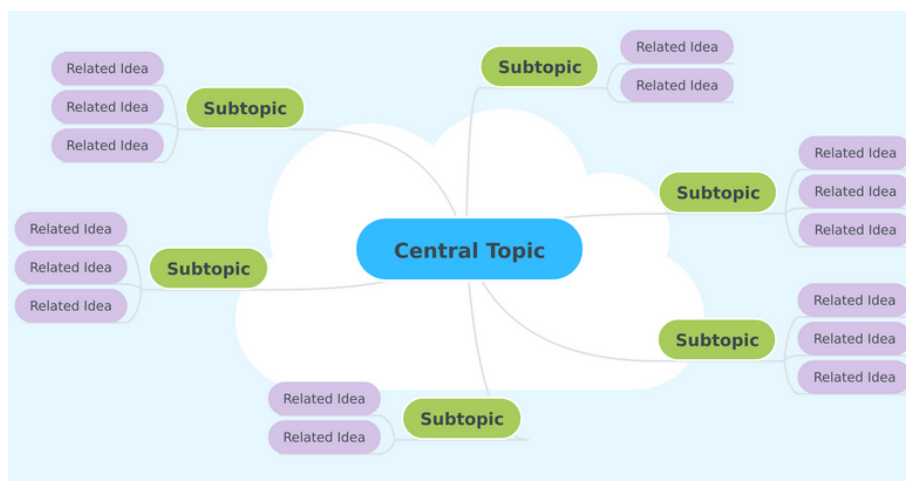
Mind Mapping

You may be familiar with the technique of Mind Mapping, which is intended to create connections between different free associated ideas. This is your opportunity to really follow any "wild hairs" of ideation that pop up--just write it down, no matter how unfeasible it may first appear. We want to see a bunch of "Wouldn't it be really cool if..." in this exercise.

Digital option and more info at www.mindmapping.com on the structure and science of this exercise. If this is process you want to expand on, here's a great online tool: <https://www.mindviewonline.com/map>

There are **no bad ideas** here, just unrealized dreams. Start with a **MAIN CONCEPT** or Central Topic (that relates somewhat to your Goal Statement) then **RADIATE OUT** from there.

Examples for a Main Concept would be "Help Artists be their best selves online" or "Show the power and beauty of rocketship building."

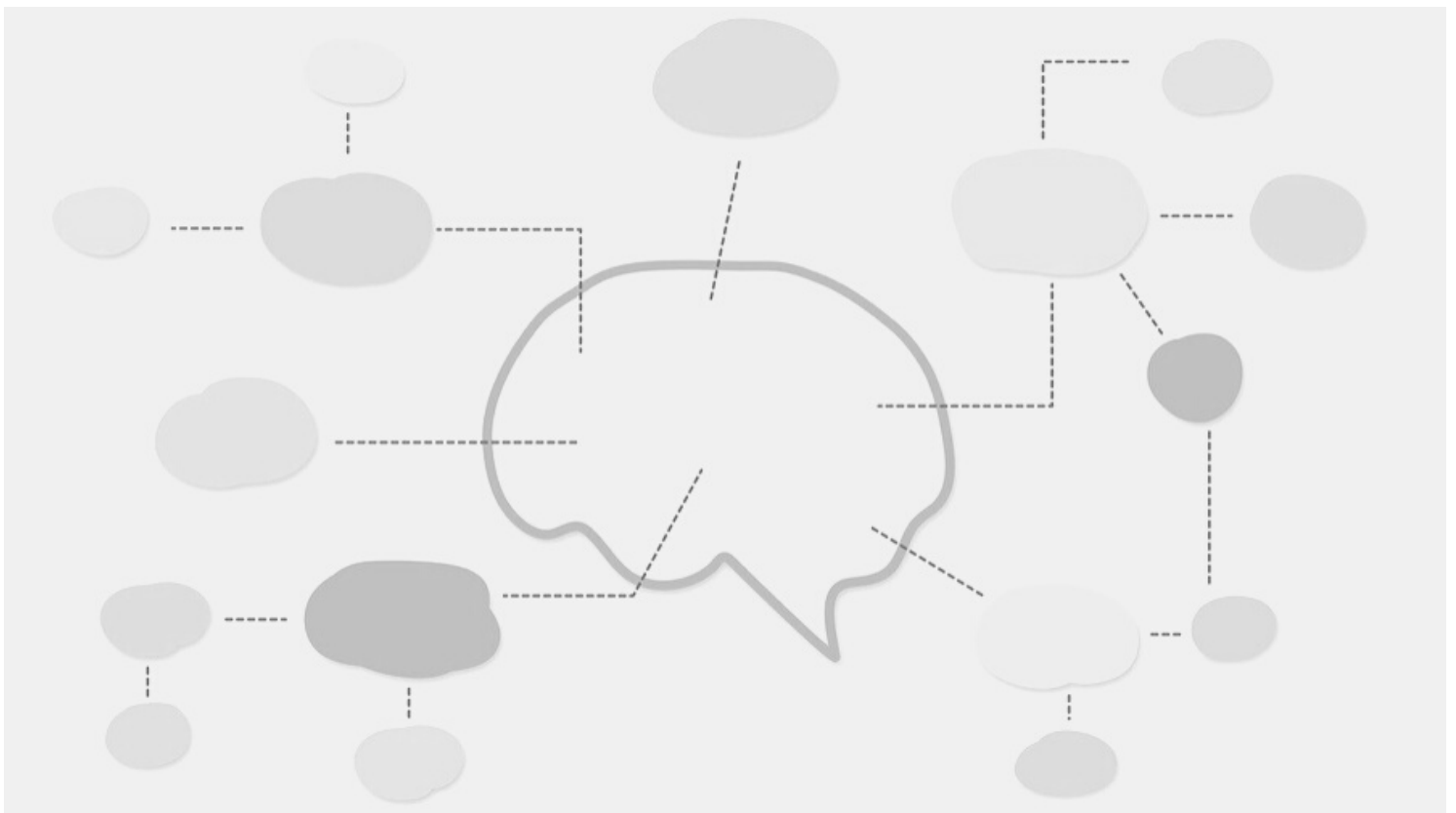


free resource from mindmapping.com

VISIONING & GOAL-SETTING

MIND-MAPPING ACTIVITY

Use doodles, drawings, words, phrases...anything to get your most creative ideas on paper. Just...**let it go!**



VISIONING & GOAL-SETTING

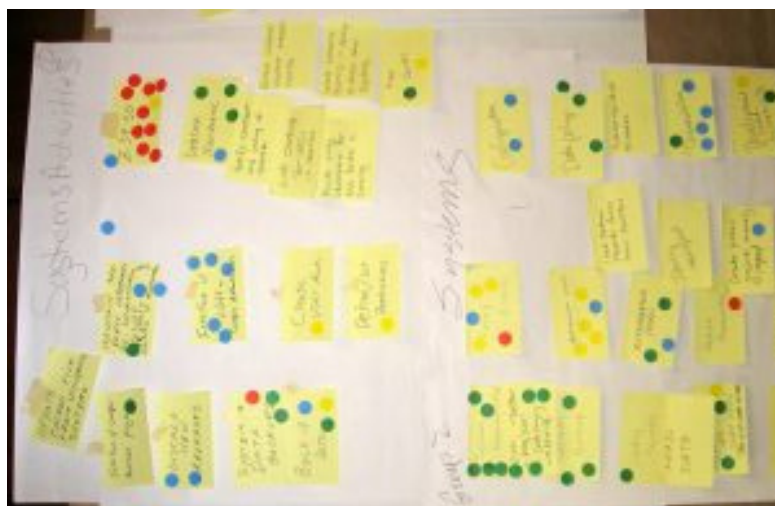
Strategic Dots - A Planning Exercise

Now that we've got some ideas on paper, let's jump into getting **more selective**. You might be familiar with the exercise of strategic planning using "dots" as "votes." We recommend this exercise to take your favorite ideas from the Mind Maps above to your Board and key decision-makers in a **collaborative fashion**.

You'll need several sheets of paper, big or small, and a room big enough for folks to walk around a bit. You'll also need either sticky colored dots (adhesive) or at least different colored markers. Everyone in the room gets a limited amount of dots: let's say 2 each of three different colors.

Identify your dot (or marker or vote) colors as **Do It Now** (#1, green), **Do It Soon** (#2, yellow), **Do It Eventually** (#3, red). Instruct all participants to move about the room, placing their dots (of the three different priorities) on the IDEAS they value.

If a **virtual option is needed**, place ideas into the chat feature of your video call, then simply allow folks the time to "like" the ideas they want to support. Alternatively, **Zoom** has a "whiteboard" feature where participants can draw collaboratively. Additional options are in the Notes & Resources on pg. 6 of this Workbook.



VISIONING & GOAL-SETTING


Strategic Dots - A Planning Exercise, continued

You'll find that this is a terrific way to **build consensus**, as likely a few ideas have "bubbled up" to the top for the entire group. Move the ideas with the most Do It Now dots to the **front of the line** for your strategic priorities, before considering all the pros and cons of the idea (that's coming up next!), and retain all ideas for an Idea **Parking Lot** ("we'll come back to those in time").

Often this exercise generates intense discussion. Keeping **"prioritization of direction"** front-of-mind, you may want to allow votes to be amended after discussion. In this context, building consensus can be a bit messy, but ultimately it is for the benefit of the whole organization. **Give it the time it needs** for the end goal to steer through.

There are some limitations to the dot-voting technique, and an alternative is viewed here: <https://dotmocracy.org/dot-voting/>

Ideally, you've **identified a direction** in which to move. You have **energy** around a set of ideas and a set of goals. NOW is the time to see which direction or idea is PRUDENT, and which can go in the bucket of "How about later..."



Need a mental
break? Doodle
here!

VISIONING & GOAL-SETTING

Prioritization - High-Low Graph

Once you have a set of ideas and direction of motion, you need to decide which of those ideas should be Top of the List, and which should be given more thought. In this exercise, you'll want to weigh **COST** versus **IMPACT**. Cost can be resources, money, time, and staff capacity. Impact can be revenue, notoriety, artistic merit/desire, or even positioning for later benefit.

We'll use a Hi-Lo Graph to help us further decide, also known as an Action Priority Matrix. For each idea you've gleaned from the Dot Voting exercise, discuss whether the idea has a **high or low COST**, and **high or low IMPACT** on your organization/art overall, and plot it on the graph below.

As you see in the graph below, High Impact-Low Cost activities are labeled "Quick Wins," while High Impact activities with higher Cost projections fall into the "Strategic Win" quadrant. Clearly, we'd like to see some **Quick Wins** boil up in your Phase 4 Projects, but we'll also be happy to help plan **Strategic Wins**. Just as certainly, you'd like to avoid elements with Low Impact and High Cost, as that likely is a waste of time and/or money at present.



Focusing for the time being on just the Quick Wins or Strategic Wins, **which ideas have moved to the proverbial "Front of the Line?"** Let's go with those...

VISIONING & GOAL-SETTING



public domain image

Select ONE idea from the Quick Wins or Strategic Wins category above. Give it some thought...**is it in-line with your mission as an artist or organization?** Does it feel like it moves along **in tandem with your Purpose** as an artist or organization?

It's incredibly helpful, after doing these exercises, to then step back, **return to the 30,000 ft level**, and just ask "**Is this idea part of who I am/who we are?**"

If there's an inkling of "Not really..." simply let it go, and move on to the next idea.

If your idea is **digitally-based**, how might it relate to OTHER online activities you've done in the past? If it feels DRAMATICALLY ahead of where you are, or where your organization's comfort level is, **it's okay to reevaluate the impact or cost.**

SECTION 3 - PROCESS OUTLINE

Now you're ready to move through the process of your project, and by and large that means answering, to the best of your ability, **a handful of questions**. True, no one likes answering questions...we all want to live in the etheria of "dreams" and "goals" all day...totally get it. However, now we've got to put some rubber on the road and figure out how to build this airplane we're currently flying.

Question #1

HAVE I SECURED ALL THE NECESSARY RIGHTS?

As creatives, we're constantly playing on the idea that my ideas and my art are my ideas and my work, and they're "not yours." Which, for some disciplines, is completely true. However, there is always the question of rights and ownership. For performance-based organizations, much of the time **we're performing OTHER PEOPLE'S work**. We need to, ethically and legally, recognize their contributions to our art-making.

And this extends beyond just performance artists. Does your website have a photo on there that is not your work? Have you sent out a newsletter with a picture you loved, even if it was someone else's painting? **Rights and ownership extend to all sorts of digital elements.**

For some elements of this project, you may need to firmly secure **synchronization (synch) rights** for a performance, or secure **usage rights** from an artist for a mailing. For others, simple crediting and linking to the original work may suffice. Taken in total, you want to have the Rights question in the back of your mind, and refer to it periodically going forward.

There are **loads of resources** available on page 6 of this Workbook--please refer to them often, and we implore you to **do your DUE DILIGENCE on Rights.**

SECTION 3 - PROCESS OUTLINE

Question #2

WHO NEEDS TO BE INVOLVED IN THIS PROJECT?

Nothing gets done in a vacuum, so here is where we will identify all the necessary people-power required for your project. We like to think of levels of involvement not always being equal, so we'll designate folks as **Do-ers**, **Supporters**, and **Audience** for this exercise.

Okay, **Do-ers** first! "Do-ers" would include anyone filming, writing, acting, making, uploading, building, coding, performing, etc. Gentle reminder to NOT FORGET YOUR **TECH PERSON**...when building projects for digital work, often the person who actually uploads or codes the project is forgotten...

We've provided a huge list of duties; use all that fit. **Leave blank what doesn't fit**. If it's helpful to include their contact info now, go for it!

COPY WRITER(S) _____	EMAIL: _____
PHOTOGRAPHER(S) _____	EMAIL: _____
VIDEOGRAPHER(S) _____	EMAIL: _____
WEB PERSON(S) _____	EMAIL: _____
PERFORMER(S) _____	EMAIL: _____
SUPPLIER(S) _____	EMAIL: _____
GRAPHIC DESIGNER(S) _____	EMAIL: _____
OTHER _____	EMAIL: _____
OTHER _____	EMAIL: _____
OTHER _____	EMAIL: _____
OTHER _____	EMAIL: _____
OTHER _____	EMAIL: _____

QUESTION #2, CONTINUED

Next, **Supporters**. These folks bring out the best in your project (and your art), and still need consideration, and planning. These are your Board members, decision-makers, idea reviewers, content reviewers, funders, assessors--especially the folks at your **Regional Arts Council**. List them here...

SUPPORTER _____	EMAIL: _____
FUNDER _____	EMAIL: _____
BOARD MEMBER _____	EMAIL: _____
OTHER _____	EMAIL: _____
OTHER _____	EMAIL: _____
OTHER _____	EMAIL: _____

Finally, and this is the big one: who is the **AUDIENCE** for this project? Audience can come in two forms: **Desired Audience**, and **Likely Audience**. This is where we typically ask: "How many of your patrons know you're online?" If the honest answer is "not many" then we know what the audience IS. But, who do we want the audience to be? Since virtual work is potentially available to a much broader audience than our typical home communities, it is tempting to say "My audience is THE WORLD!" But, truly knowing your audiences--both desired and likely--is dramatically important to the success of a project.

More on the next page!

QUESTION #2, CONTINUED

Desired audience often can be found in a similar “world” to your art. Is there a local/region/national chapter of a professional artists union to which you belong? Is there a consortium of regional theaters, or a much-respected community arts center in another town that you would like to emulate? Ask them for a list of their patrons, and now you’ve broadened your desired audience.

More considerations: **Is your current audience of a particular age? Would you like to broaden into a new age cohort?** That demographic awareness may dictate the avenue of distribution for your project. This is primarily felt in the social media world, where the most popular social media platforms are fairly age-specific. There are some resources in the earlier part of this Workbook that can help identify those demographic trends.

In answering these questions, be as **thorough** as you can!

Who is your **LIKELY** audience for this project?

Who is your **DESIRED** audience for this project?

PROCESS OUTLINE, CONTINUED

Question #3

WHICH ASSETS DO I NEED TO BRING TO THIS PROJECT?

Whether you're building a house, a car, or a website, you need the **raw materials** that become the finished product. **Assets** here mean all the components you have in-hand that can **add richness and depth** to your project: a photo headshot, marketing materials you've created, video of your work (either in-progress or complete), a logo...even shots from that fundraising event where someone thought it would be nice to have their cousin Robbie snap some photos. Sometimes, just listing what you HAVE is instructive for what your project can BECOME.

Assets could also mean the **new or existing tech equipment** you've got or need to consider adding. Need to shoot some video, but don't own a smart phone? Put that on the list.

Here's a handful of categories of assets...create your own list! If you need to put links to specific files, feel free!

Visual assets

Tech/equipment assets

Written assets

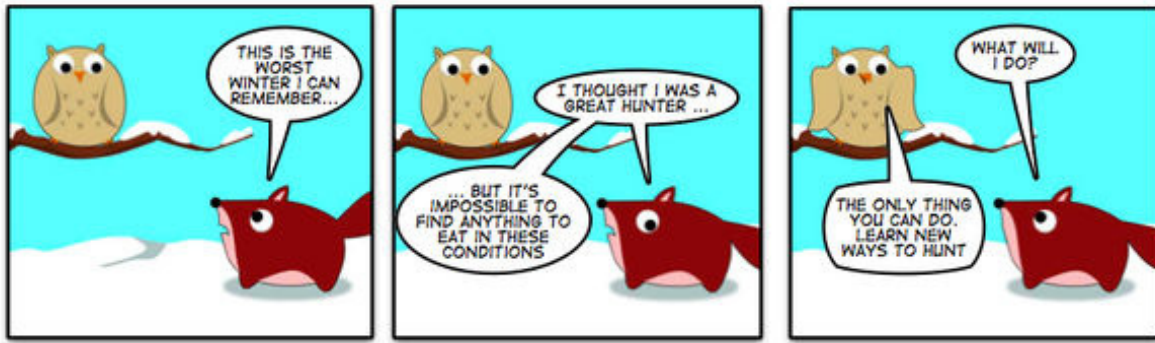
Other assets

PROCESS OUTLINE, CONTINUED

Question #4

WHAT DO I NEED TO LEARN/PRACTICE?

This is all about building and enhancing skills. Often, the skills you WILL need are not readily apparent...but occasionally they are quite obvious.



www.fridayreflections.com

Creative Commons work

Friday Reflections by J. Cook, © Analisa Enterprises, LLC

First, list the **skills you HAVE** and **use daily**: painting, teaching, writing copy for marketing blurbs, showing up on Zoom. Keep your project in mind, but if this turns into a "pat yourself on the back" session...great!

QUESTION #4, CONTINUED

Now, which skills will you **ABSOLUTELY need to learn** for this project?

Some examples:

- Connecting StreamYard to YouTube
- Setting up lighting for my photo-shoot
- Creating an "Event" on Facebook
- Sharing a file on Google Drive



Reserve the space below for skills or duties you discover you need to **LEARN or PRACTICE** as the project goes along. **No one should be expected** to host a Live Virtual Fundraising Gala without a rehearsal or seven...



Question #5

WHAT IS A REALISTIC TIMELINE?

Project management, especially in an arena that feels unfamiliar, is complex in the best of situations. However, there is one strategy for successful project management that helps the most: to **set (and meet) realistic deadlines.**

First, take your most generous estimate of total time...and **add 25%**. If you thought building a website could be done in a long weekend, apologies, but that's not gonna happen. Then, cut yourself some slack. Remind yourself this is in service of your art, and art cannot be rushed. Okay...wasn't that easy?!

Work in reverse: if the concert or event is April 23rd, what needs to happen 1-2 weeks prior, or 1 month prior, or 1 year? It is entirely possible that a fixed date MAY change once you fully grasp the scope of the project. If an end date is truly immovable, **build in plenty of secure deadlines** to ensure that you MEET that fixed date.

If the date is flexible, **start with the IDEAL launch time.** This will put a gentle "hold" on a macro-timeframe that will let you scaffold the rest of the deadlines around it.

PROJECT PHASE	DATE DUE
LAUNCH PHASE	-----
TEST PHASE	(1 week prior-to-Week Of) -----
DRAFT PHASE	-----
BUILD PHASE	-----
OUTLINE PHASE	-----

QUESTION #5, CONTINUED

No project timeline should live in a silo, however. **SHARE those deadlines** with as many of the colleagues from Question #2 (Who need to be involved?) as is appropriate. **Setting expectations** of timeframe for OTHERS is as establishing realistic timeframes for a project.

Timeframe discussions are so very project-dependent that we'll leave you plenty of space to jot, doodle, or finalize more deadlines for project elements as you think of them. We'll also throw in some reminders here and there.

When do you need to gather print materials?

Could you extend your deadline by 1 day if the **product would be better?**

Can you or your colleagues reasonably be expected to work on weekends?

WRAP-UP/CHECK-IN

Congratulations, you've finished the FIRST portion of this project Workbook! This portion has been the strategic work that is needed to understand fully the WHY of your project.

The remainder, and indeed the **nitty-gritty detail** of your project, will be done on a platform called **Teachery**. It is built as an **online** course module, specific to your project. In this module, you'll learn HOW to do your project. Links to the modules will be shared via email.



Time for a little reflection. Which aspect of this work was **relatively easy** to complete? Which was **more complicated**? Which aspects will you use on a future project? Which will you skip?

Take time, on the following page, to write a very brief **self-assessment** about your work on this portion of the Workbook here.

WRAP-UP/CHECK-IN

Assess your work on the first portion of the Workbook. Which sections were easier to complete? Which were more complicated?

Which areas of your project are you feeling **most able to accomplish?**
Where do you need the most help?

ABOUT OPEN VOICES



A LITTLE BIT ABOUT OUR COMPANY

Open Voices LLC, the umbrella of the national Beer Choir community-building movement, is a collection of talented artists and arts consultants committed to raising the profiles and community impact of organizations throughout the Upper Midwest.