MSL2350H Museum Planning and Management: Projects and Fundraising
Mondays, 1-4 pm, Bissell 538

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<tr>
<th>Instructor</th>
<th>Costis Dallas</th>
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<td>Office Hours</td>
<td>M: 4-6 pm; W: 12-2 pm. By appointment.</td>
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Course Description
The objective of this course is to offer students applied understanding of the concepts and developing essential competencies for planning and managing projects in museums, as well as of revenues, grant making and fundraising in the museum environment. It addresses topics such as project planning and scheduling, major gift solicitation and fundraising campaigns, covers new approaches such as agile project methodologies and crowdfunding, and is based on a combination of lectures, class discussion, workshops and group activities. Students enrolled in the course are assessed on the basis of a project charter and project plan for a project of their choosing, an essay on a topic related to museum income and fundraising, and an online final examination.

1 Pre-final version 0.99 (23/1/2016). Corrigenda and addenda will be communicated via Blackboard.
Assignments

The course will be assessed on the basis of four assignments (described in the Class Schedule section). The dates assignments are due, and their weight as a percentage of the final grade, are presented below.

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<tr>
<th>Assignment</th>
<th>Due date</th>
<th>Weight</th>
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<tbody>
<tr>
<td>A1. Project charter</td>
<td>February 5</td>
<td>25%</td>
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<tr>
<td>A2. Project plan</td>
<td>March 11</td>
<td>25%</td>
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<tr>
<td>A2. Museum income and fundraising essay</td>
<td>April 8</td>
<td>20%</td>
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<tr>
<td>A4. Final examination (using Blackboard)</td>
<td>Examination week (TBD)</td>
<td>30%</td>
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Course Learning Outcomes

On completion of the course, participants will be able to:

1. Identify, conceptualize, argue the business case, and define the main parameters of a successful project (assessed in Assignments A1 and A4).
2. Grasp the challenges, principles and processes of working effectively with an project team and project stakeholders (assessed in Assignments A2 and A4).
3. Develop essential capabilities for using methods and software tools useful for project planning and management (assessed in Assignment A2).
4. Set up and plan a museum project (assessed in Assignment A2).
5. Develop a project management plan with an appropriate work breakdown structure (using appropriate IT tools if desired), allocating resources, and taking into account critical path considerations (assessed in Assignment A2).
6. Recognize and define possible revenue sources, grant making and fundraising strategies, means of solicitation and relevant issues for museums (assessed in Assignments A3 and A4).
Contribution to program learning outcomes

The course aims to contribute to the following program learning outcomes:

- Building awareness and applied understanding of professional responsibilities related to museum project management and fundraising (course learning outcomes 1-9).
- Building ability to innovate in the face of new challenges, namely, the changing conditions of funding in the museum sector (course learning outcomes 1, 2 and 8).
- Building ability to use appropriate methods to assess on-going project development and to evaluate achievements and effects of museum activities with regard to different kinds of museum projects, and to attracting revenue (course learning outcomes 4, 5, and 8).
- Building ability to organize processes involving people, financial and physical resources in order to actualize projects (course learning outcomes 5, 6, and 7)
- Building ability to work in and manage groups and interpersonal relations in museum projects (course learning outcomes 3 and 5).

Course Format and Resources

The course is based on three hour classes, be a combination of lectures, discussions, teamwork, interactive exercises and in-class activities. Readings marked as required in the Class Schedule must be studied ahead of class, and will bear on student assessment.

As students in a professional graduate program in museum studies carry often valuable experience of museum work relevant to projects or fundraising, course participants will be expected to play an active role in defining their own personal learning objectives, the scope of their assignments, and in introducing relevant experiences, questions and material to their classmates.

**Tools:** The course is supported by Blackboard for the purposes of regular communication, dissemination of course materials, links and information, email communication, and submission of assignments. Software will also be used to support learning on the course subject matter. Students are encouraged to download and practice with a trial version of MS Project Professional, and with online services and tools, such as Trello, Basecamp and Google Docs. Course assignments can be completed without use of software, but, for those prepared to make the additional effort, software does facilitate greatly the processes of planning and managing projects evaluated through course assignments.

the Inforum, and is available for purchase at the University of Toronto bookstore, and, also for rent in electronic book format, from the publisher website (http://www.nelsonbrain.com/shop). Copies of the 4th (2009) and 5th (2012) editions may also be available online or in second hand bookstores.

**Other resources:** In addition, the course will use a small number of cases, which may be acquired as an Ivey Publishing coursepack, as well as additional simulations and planned activities provided by the instructor. Further details will be posted on Blackboard.

Apart from relevant sections from Gido & Clements, required readings include selected articles and other readings from the project management, fundraising and museum studies literature. Supplementary readings are also suggested, intended to provide context or in depth focus on particular aspects of the course subject matter. Resources available digitally through the University of Toronto Libraries are the responsibility of students to download.

## Class Schedule

**BLOCK 1: PROJECTS**

1. **January 11**  
   a) Introduction and course overview: topics, assignments and learning outcomes. Course procedures and rules.  
   b) What is a project? What is project management? Whom is it for? People, and activities. Project success, risk, failure. The project triangle: cost, performance, and time.

No readings for this first week of class.

2. **January 18**  
   Project management concepts. Examples of museum projects: new museums; redevelopment; collection management; digital projects; exhibitions; community projects. Constraints. The project lifecycle and project management process. Sources of further knowledge about projects.

**Required readings:**


**Supplementary readings:**


**Group activity:**

Performing a SWOT analysis and identifying the key elements for a good museum project.

**Required readings:**


Gido & Clements, Chapter 3: Developing Project Proposals.

**Supplementary readings:**


4. February 1  Setting up a project. Project management structures, procedures and artefacts. Project communication and documentation. Software tools for task tracking, documentation and communication. The agile approach, Kanban and Scrum. User stories, epics, sprints and burndown.

Workshop:
Introducing Trello (http://trello.com); setting up a Scrum board.

Required readings:
Gido & Clements, Chapter 12: Project Communication and Documentation.


Supplementary readings:


February 5: Assignment A1 – Project charter is due.
Develop a project charter for the project you are going to work on for the course.

Case activity / Workshop:
The HMS Pinafore case: creating a project activity network diagram and WBS. Basic concepts and use of Microsoft Project.

Required readings:
Gido & Clements, Chapter 4: Defining Scope, Quality, Responsibility, and Activity Sequence.

Supplementary readings:


February 15-19: No classes (Reading week).


Workshop:
Building a responsibility assignment matrix and populating a Gantt chart using Microsoft Project.

Required readings:
Gido & Clements, Chapter 5: Developing the Schedule.

Supplementary readings:

Hands-on activity:
Building a project budget.

Required readings:
Gido & Clements, Chapter 6: Resource Utilization.

Gido & Clements, Chapter 7: Determining Costs, Budget & Earned Value.

Supplementary readings:


8. March 7  Running the project. The role of the project manager and the effective project leader. Building the project team. Leadership and motivation. Establishing and maintaining consensus.

Guest speaker: TBD

Required readings:
Gido & Clements, Chapter 10: The Project Manager.

Gido & Clements, Chapter 11: The Project Team.

Supplementary readings
March 11: Assignment A2 – Project plan is due.

Write a project plan for a museum project of your choice (with a Gantt chart specifying work breakdown structure, resource allocation and deliverables) and an outline of key considerations such as budgeting.

**BLOCK 2: FUNDRAISING**

Case activity:
The Juno Beach Centre case: compelling factors for fundraising success; identifying revenue sources, partners and a fundraising strategy.

Required readings:


Supplementary readings:

10. March 21  Grant making. Sources of grant funding. Understanding funding programs. Program objectives, funding eligibility and evaluation criteria. Elements of a successful grant.

Group activity:
Grant proposal preparation: applying to the MEIG program for a grant.

Guest speaker: Elka Weinstein, Museum advisor, Ministry of Culture, Tourism and Sport, Ontario

Required readings:


11. March 28  Giving and sponsorship. Types of giving, from philanthropy to commercial sponsorship. Donors; motivations for giving to the arts and culture. Identifying donors; solicitation; major gifts.
Guest speaker: TBD

**Required readings:**


**Supplementary readings:**


**Required readings:**


**Supplementary readings:**


Due April 8: Assignment A3: Museum income and fundraising essay.
A critical essay of 1,500 words on a topic related to museum income and fundraising. Students should confirm the topic and title of their essay with the instructor ahead of time.

Week of April 11 (date TBD): Final examination.
A Blackboard-based online examination on the required readings and lectures of the course, based on a combination of short open answers and multiple choice (or similar style) closed responses.

Course Policies

Attendance
Regular on-time attendance in class is an important part of this course. If you miss class it is your responsibility to find out what you missed from your fellow students.
Evaluation

All assignments are evaluated in accordance with (1) the University of Toronto Governing Council's Graduate Grading and Evaluation Practices Policy and (2) the Faculty of Information's Guidelines to Grade Interpretation. The Governing Council policy is available at http://www.governingcouncil.utoronto.ca/policies/grading.htm. The Faculty of Information's Guidelines to Grade Interpretation supplement that policy and are available at http://www.ischool.utoronto.ca/grade-interpretation.

Late assignments

A penalty of 2% per day will be imposed on every assignment if it is not handed in by the due date. Papers that are still outstanding 5 days after the due date will not be accepted. Extensions without penalty will only be granted to individual assignments in cases of legitimate illness or emergencies. Such extensions will not be granted for requests made on or after the due date for the assignment. This policy is to ensure fairness to all students.

Extensions beyond the end of term

Extensions beyond the term in which the course is taken are subject to guidelines established by the School of Graduate Studies (SGS). Please see: http://www.sgs.utoronto.ca/current/policies/coursework.asp. “The authority to grant an extension for the completion of work in a course beyond the original SGS deadline for that course rests with the graduate unit in which the course was offered, not the instructor of the course.” Students must petition the graduate unit for extensions, using the SGS Extension to Complete Coursework form.

Academic integrity

Please consult the University’s site on Academic Integrity. The iSchool has a zero-tolerance policy on plagiarism as defined in section B.I. 1. (d) of the University’s Code of Behaviour on Academic Matters. You should acquaint yourself with the Code and Appendix “A” Section 2. Please review the material covered in the Cite it Right Inforum workshop and, if necessary, consult the site How Not to Plagiarize.

Citations

Citations are not necessary for assignments A1 and A2 of this course. Students should adopt APA or an alternative widely used citation standard for assignment A3.
**Writing support**

The [SGS Office of English Language and Writing Support](#) provides writing support for graduate students. The services are designed to target the needs of both native and non-native speakers of English and include non-credit courses, single-session workshops, individual writing consultations, and website resources. These programs are free. Please avail yourself of these services, if necessary.

**Accommodation of students with disabilities**

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability or health consideration that may require accommodations, please feel free to approach me and/or the Accessibility Services Office as soon as possible. The Accessibility Services staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let them, and me, know of your needs, the quicker we can assist you in achieving your learning goals in this course.