



go artsy

WORKPLAN: DETAIL

Phase 1+2
Apr 2019 to Sep 2020

This draft document is a work-in-progress.
Version 1.3

incubated by



October 2018

1. KEY MILESTONES

- Identify and establish appropriate cooperative corporate structures to secure long-term sustainability
- Complete open source and open data legal agreements necessary to secure platform intellectual property and member/user privacy
- Complete technical requirements gathering for desktop (Windows/OS) and mobile platforms (iOS/Android)
- Deepen relevance of platform response to diverse industry needs via on-site public consultations across Ontario
- Develop and test initial prototypes for the performing, visual + disability arts (alpha)
- Present technical information webinars to share progress with the community
- Release preliminary public source code repository with documentation in English and summaries in French
- Recruit 100 early adopters via preliminary marketing communications in Ontario
- Recruit additional partners and advisors from outside Ontario to grow awareness and networks across Canada
- Evaluate impact and submit progress reports prior to launch of Phase 2

2. FEATURES ROADMAP

Developing an arts-centric ERP for all disciplines is a complex and ambitious undertaking that will take multiple phases of development to successfully deliver. Artse takes an iterative approach to addressing the varied organizational, sociocultural, financial and technical opportunities and barriers that guide and impede its path.

The features roadmap for Artse consists of six modules to be delivered in six distinct phases of 9 to 12 months each. The current workplan is for the first two phases only. At the conclusion of each phase, a public beta for the new module will be released featuring ‘quick-win’ functionalities to attract the interest of early adopters. Each module will continue to be developed and refined over subsequent phases as feedback is collected from the community thus gradually evolving into a mature platform that is attractive to the whole industry.

Phase 1 will focus on the development of basic user account/profile management, plus wireframing of core functionalities in project and financial management and quantitative impact reporting as an alternative to Canadian Arts Data. See Section 7 Core Components and Section 8 User Experience below for more details.

3. ACTIONS

Phase 1 includes three major action stages:

- **Initiate:** organizational, technical, and community engagement planning (Apr to Oct 2019)
- **Incubate:** technical production and community outreach (May to Dec 2019)
- **Iterate:** phase evaluation and reporting (Jul to Dec 2019).

4. INITIATE Apr to Oct 2019

4.1. ORGANIZATIONAL PLANNING

4.1.1. Administration pre-planning (ArtsPond) Apr to May 2019

Confirm partnership roles and responsibilities, critical paths, budgets and contracts for Phase 1+2. Recruit additional partners and advisors. Establish secure information systems for internal

collaboration, including SharePoint/Office365 (administrative file sharing and team communications), Jira (issue tracking), Google Cloud Platform/Microsoft Azure/Amazon Web Services (development servers and daily off-site cloud backup). Purchase and establish internal network server for daily on-site backup of code repositories only (not member/user data).

4.1.2. Corporate planning (Stephanie Guico, ArtsPond, Kalogiannides Law)

May to Oct 2019

Review, prioritize, and adopt corporate structures suited to Artse's long-term sustainability. Prepare summary presentations to be shared via platform websites (interim site @ DigitalASO.ca, platform site @ Artse.ca), information webinars, and on-site public consultations in phases described below. Establish and promote governance policies and member benefits structures to prospective members.

4.1.3. Legal planning (Kalogiannides Law, ArtsPond, Stephanie Guico) May to Oct 2019

Review, prioritize, and prepare user agreements including intellectual property, privacy, terms of service, open source and open data requirements. Prepare summary presentations to be shared via platform websites, information webinars, and on-site public consultations.

4.1.4. Inaugural meeting of directors and members (ArtsPond, Stephanie Guico, Kalogiannides Law) Sep or Oct 2019

Host inaugural meeting of cooperative board of directors and members to ratify corporate policies, legal agreements, and member benefits structures and establish a strong independent governing body.

4.2. TECHNICAL PLANNING

4.2.1. Systems design planning (BeMused Network, Plank Design, ArtsPond)

Apr to May 2019

Confirm detailed timelines, responsibilities, milestones, budgets, hardware infrastructure and software requirements for systems design and technical development of required data structures, systems architecture, prototypes, back-end and front-end development, testing, quality assurance, and technical documentation.

4.2.2. Business intelligence planning - quantitative (Hill Strategies Research, ArtsPond)

Apr to Oct 2019

Develop and prioritize preliminary strategies and practices for capturing and reporting standard and ad hoc quantitative analytics to guide technical production of financial and statistical analytics modules. Produce and share summaries at public consultations, technical webinars, and via other media.

4.2.3. Business intelligence planning - qualitative (Hill Strategies Research, ArtsPond)

Apr to Dec 2019

Develop and prioritize preliminary strategies and practices for capturing and reporting standard and ad hoc qualitative analytics to guide technical production of statistical module experiment in Phase 2.

4.2.4. Domain ontologies review (ArtsPond, BeMused Network, Hill Strategies Research)

The study and application of available domain ontologies for arts metadata will be critical to the success of this project long-term. The development team will draw from such resources as:

- Government of Canada: *Metadata for Art and Historical Collections*
<https://www.canada.ca/en/heritage-information-network/services/collections-documentation-standards/chin-guide-museum-standards/metadata-data-structure.html>

- Observatoire de la culture et des communications, Insitut de la statistique du Québec :
État des lieux sur les métadonnées relatives aux contenus culturels
http://www.stat.gouv.qc.ca/statistiques/culture/etat-lieux-metadonnees_an.html

4.3. ENGAGEMENT PLANNING

4.3.1. Soft public launch (All) Mar 2019

Pending confirmation of funding, a soft launch for Artse activities supported by Canada Council for the Arts will be presented during the second Digital Arts Services Symposium (a co-production between Jessa Agilo, ArtsPond, and BeMused Network, presented at the Toronto Reference Library, Toronto Media Arts Centre, and other venues from March 15 to 20, 2019)

4.3.2. Detailed marketing communications and outreach planning (All) Apr to May 2019

Confirm detailed timelines, responsibilities, milestones, budgets for on-site public consultations, platform website design (Artse.ca, interim site @ DigitalASO.ca), information webinars, marketing promotions, communications, and publicity.

4.3.3. Evaluation and reporting planning (All) Apr to Jun 2019

Confirm detailed shared evaluation and reporting outcomes and measures.

4.3.4. Preliminary marketing communications and publicity (ArtsPond, Sue Edworthy Arts Planning) Jun to Oct 2019

Launch Phase 1 promotional advertising and publicity campaign to promote awareness of the Artse brand and recruit up to 250 early adopters by conclusion of Phase 2 (100 in Phase 1).

4.3.5. Public consultations – Platform Technology and Corporate Structure (ArtsPond, Mass Culture, Ontario Association of Art Galleries, Creative Users Projects, BeMused Network, Stephanie Guico) Jun to Sep 2019

Facilitate four on-site community consultations in Toronto, London, Ottawa and Sudbury. The consultations are up to 2 days each, including four 3-hour sessions with artists and administrators from four groups: performing arts, visual arts, disability arts, and combined. The sessions will help promote and solicit feedback on the detailed technology plans, features, and corporate membership structures for Artse. They will also solicit detailed user stories, experiences, and objectives to ensure Artse remains responsive to the needs of the community. They also coincide with and support Section 5.1.3 Technical Production: Requirements Gathering. Venues are TBA.

4.3.6. Public consultations – Digital Literacy and Arts Management Workshops, TBA (Cultural Human Resources Council and others TBC) Sep to Dec 2019

ArtsPond is in dialogue with Cultural Human Resources Council, WorkInCulture and others about producing supplementary workshops on effective applications of digital platforms for business management and impact practices. Held in tandem with the development of Artse, these workshops will help demonstrate the value of comprehensive data management platforms like the one we are creating while fostering literacy on how to use them effectively. This activity is pending confirmation of funding from other sources.

5. INCUBATE May to Dec 2019

5.1. TECHNICAL PRODUCTION (BeMused Network, Plank Design, ArtsPond)

5.1.1. Defining the Problem and Scope Apr 2019

5.1.2. Vetting and Hiring Service Providers May 2019

5.1.3. Requirements Gathering May to Jul 2019

5.1.4. Wireframing / Prototyping Jun to Sep 2019

5.1.4.1. Workflow Diagrams

- 5.1.4.2. Users Stories
- 5.1.4.3. Development Roadmap
- 5.1.4.4. User Experience Objectives
- 5.1.4.5. Stakeholder & User Feedback

5.1.5. Technical Development Jul to Dec 2019

- 5.1.5.1. Data Structure
- 5.1.5.2. Systems Architecture
- 5.1.5.3. Coding
- 5.1.5.4. Testing / Debugging
- 5.1.5.5. Quality Assurance
- 5.1.5.6. Data Visualization
- 5.1.5.7. Backend Development
- 5.1.5.8. Frontend Development
- 5.1.5.9. Quality Assurance

5.1.6. Technical Documentation and Open Source Code Repository Release Oct to Dec 2019

5.1.7. Alpha Launch Nov to Dec 2019

5.2. COMMUNITY OUTREACH

5.2.1. Knowledge Sharing: Webinars (ArtsPond, BeMused Network, Plank Design, Hill Strategies Research, Kalogiannides Law, Stephanie Guico) Aug and Nov 2019

A minimum of two webinars 45 to 60 minutes in duration each will be presented online, with archival recordings disseminated via YouTube. The sessions will share progress on the organizational, legal, community, and technical development of Artse and provide opportunities for the community to ask questions.

5.2.2. Knowledge Sharing: Blog Articles, White Papers (All) Jul to Dec 2019

Each major partner will be asked to write at least one blog article or white paper sharing insights from their participation in the project. These responses will be disseminated for free via the platform websites.

5.2.3. Knowledge Sharing: Videos (ArtsPond) Oct to Dec 2019

ArtsPond will produce one documentary-style trailer video 5 to 8-minutes in length to share lessons including interviews with partners, users and community members. The video will be shared through YouTube and/or Vimeo.

6. ITERATE Jul to Dec 2019

6.1. EVALUATION

6.1.1. Partner evaluation (All) Jul to Nov 2019

All partners and advisors will contribute to evaluation on an ongoing basis. Full-team progress reviews will be completed quarterly. Smaller committee evaluations in community, organizational, and technical development will be completed monthly. Evaluation will be based on milestones and practices agreed upon in Section 4.3.2 Evaluation and Reporting Planning.

6.1.2. Participant surveys (ArtsPond) Jul to Nov 2019

All participants will be invited to contribute feedback on their experiences and overall assessment of the progress of the initiative through online surveys, informal interviews and group check-ins during the project consultations and other shared activities.

6.2. REPORTING

6.2.1. Mid-cycle audit and reports (ArtsPond) Sep to Dec 2019

Complete fiscal audit of expenditures from Apr to Aug 2019, and pre-audit fiscal reports from

- **Segments D to F (Impact practice)** are seen as the aspirational “secret sauce” providing the critical glue for a platform striving to capture and manage data for the purposes of learning. It will take time to foster literacy of the sector to appreciate the importance of sustaining lifelong impact practices, and to build an information system that supports it. The planned community consultations are seen as a first step to build community knowledge and to successfully realize these components across all six iterative phases.

8.1. C-CHAIN (A): CONTACT PROFILE

Developing the following features will provide a baseline of quick-win components that foster trust among the partners while also providing a critical foundation for subsequent components to follow. A large number of open source projects are already available for contact management that will help develop, integrate and launch these components efficiently.

8.1.1. User and core collaborator profiles

The user will be able to manage basic data about themselves and an unlimited number of project collaborators, including

- Contact information
- Professional affiliations
- Education and employment
- Histories and biographies
- Artistic statements (career)
- Profile images
- Physical attributes and demographics
- Websites and social media channels
- User account preferences and permissions
- And more for both individuals and companies in their networks

8.1.2. User roles

- Super administrator – all account rights and privileges
- Administrator – all account rights and privileges (custom by user)
- Editor – view and edit content
- Author – create content only
- Subscriber – view content only

8.1.3. Collaborator roles (creation, production, administration)

- Directors
- Curators, presenters
- Artists, creators, performers
- Designers
- Technical and production
- Administration
- Volunteers
- Custom collaborator roles

8.1.4. Contact data entry and privacy

Contact data may be entered manually through survey forms or imported from external sources such as XML/JSON queries to LinkedIn or Facebook APIs. Contacts may choose to keep their profile information private or public. They may choose, for example, to make specific elements of their profile completely private to themselves, discoverable for connections to other users in the platform or in subsequent phases by the public through open profile pages in discoverable semantic web / linked data formats.

8.1.5. Custom contact types and reports

Users will be able to produce standard and customizable contact types and reports that extend the core functionalities of the platform. Standard reports to be developed include:

- Contact lists and affiliations
- Professional histories using industry standard resumé templates.

8.2. C-CHAIN (B): CREATION / CAREER (PROJECT) LIFECYCLE PROFILE

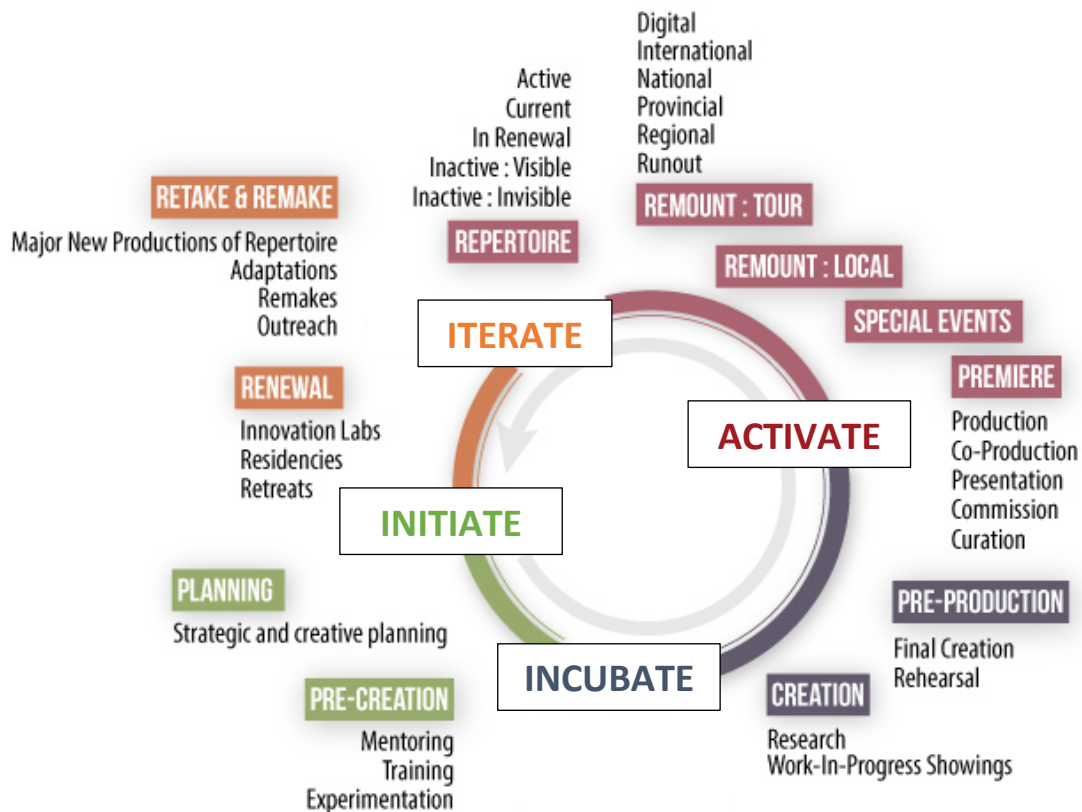
The user will be able to identify core metadata related to an unlimited number of projects, such as project title, project type, dates, collaborator roles, and artistic statements, as described below. The goal is to outline specific projects and their various lifecycles and then devote the majority of Phase 1 resources to the development of finance components described in Section 8.3. Support for more detailed project data including activity statistics will become the focus in Phase 2.

8.2.1. Project types

The user will be able to manage core data about their creative and professional projects and activities, including:

- Creation
- Production
- Co-production
- Exhibition
- Broadcast
- Recording
- Touring
- Presentation
- Curation
- Education
- Outreach
- Special events
- Professional development
- Strategic planning
- Business development
- Other custom content types

PERFORMING ARTS PROJECT LIFECYCLE



8.2.2. Project lifecycle types

The user will be able to capture, categorize, and compare datasets spanning the full lifecycles of each project across multiple phases, including:

- Initiate (pre-planning)
- Incubate (creation and pre-production)
- Activate (production)
- Iterate (post-production)
- Other custom categories

The platform will offer a number of built-in project lifecycle maps to guide categorization and planning according to the specific needs and interests of different disciplines and communities. For example, a single project in the performing arts might move through some or all of the **Performing Arts Project Lifecycle** (created by Jessa Agilo, see above).

8.2.3. Project detailed data (stage 1)

For each project and project lifecycle, the user will be able to manage core **projected, revised, and actual** metadata such as:

- Titles
- Collaborators and roles
- Dates, schedules, timelines
- Venues
- Artistic statements (unlimited versions, by date, by character length, by user rating)
- Much more discipline- and format-specific arts metadata will be prioritized through community consultations and review of available domain ontologies for the arts in Section 4.2.4 Domain Ontologies
- Other metadata and content described in Section 8.3 to be added in Phase 2

8.2.4. Project data entry and privacy

Project data may be entered manually through survey forms or imported from external sources such as XML, JSON, or Excel/CSV. Users may choose to keep their project information private or public. They may choose, for example, to make specific elements of their projects completely private to themselves, accessible to other users granted administrative rights to view and/or edit data, discoverable for connections to other users in the platform, or in subsequent phases by the public through open profile pages in discoverable semantic web / linked data formats.

8.2.5. Project reports

Users will be able to produce standard reports including:

- Project lists
- Project details, by lifecycle/date, by collaborator, by venue

8.3. C-CHAIN (C): COLLABORATION MANAGEMENT

There are many facets to be included under the collaboration management component long-term, from strategic and programming planning, project and HR management to contracting, For Phase 1, the focus will be financial planning and reporting.

8.3.1. Budgets

The user will be able manage and visualize financial data related to each project and project lifecycle, encompassing unlimited **projected, revised and actual** budgets, including:

- Income statement, by all projects (all data, by project, by project lifecycle, by fiscal or calendar year, by custom date range, by comparison of two date ranges)
- Income statement, by project (all data, by project lifecycle, by fiscal or calendar year, by custom date range, by comparison of two date ranges)

- Balance sheet (by fiscal year, by custom date, by comparison of two dates)

8.3.2. Financial chart of accounts

The user will be able manage and visualize financial data according to custom chart of accounts identified by the user, or by auto-mapping financial data to available templates provided by the platform, including chart of accounts required by:

- Canadian Arts Data
- Canada Revenue Agency Corporate and Individual Tax Returns



PHASE 2
Jan to Sep 2020

9. KEY MILESTONES

- Further refine cooperative corporate structures and legal agreements to secure platform sustainability
- Complete requirements gathering and deepen industry awareness and support through robust marketing campaign
- Develop and test alpha and beta modules
- Refine and launch financial module (beta)
- Present technical information webinars to share progress with the community
- Release public source code repository with documentation in English and French
- Recruit up to 250 early adopters
- Evaluate impact and submit progress reports prior to submission of new funding proposals for Phase 3 + 4.

10. ACTIONS

Similar to Phase 1, Phase 2 includes three major action stages:

- **Initiate:** organizational, technical, and community engagement planning (Jan to Feb 2020)
- **Incubate:** technical production and community outreach (Jan to Sep 2019)
- **Iterate:** phase evaluation and reporting (Mar to Sep 2020).

11. INITIATE Jan to Feb 2020

11.1. ORGANIZATIONAL PLANNING

11.1.1. Administration pre-planning (ArtsPond) Jan to May 2020

Confirm partnership roles and responsibilities, critical paths, budgets and contracts for Phase 2. Recruit additional partners and advisors.

11.1.2. Corporate planning (Stephanie Guico, ArtsPond, Kalogiannides Law) Jan to Mar 2020

Revise and update corporate structures and membership benefits suited to Artse's long-term sustainability based on insights from Phase 1. Prepare summary presentations to be shared via platform websites, information webinars, and on-site public consultations.

11.1.3. Legal planning (Kalogiannides Law, ArtsPond, Stephanie Guico) Jan to Mar 2020

Revise and update user agreements including intellectual property, privacy, terms of service, open source and open data requirements based on insights from Phase 1. Prepare summary presentations to be shared via platform websites, information webinars, and on-site public consultations.

11.1.4. Followup meeting of directors and members (ArtsPond, Stephanie Guico, Kalogiannides Law) Mar or Apr 2020

Host second meeting of cooperative board of directors and members to ratify revised corporate policies, legal agreements, and member benefits structures and continue to grow a strong independent governing body.

11.2. TECHNICAL PLANNING

11.2.1. Systems design planning (BeMused Network, Plank Design, ArtsPond)

Jan to Feb 2019

Confirm detailed timelines, responsibilities, milestones, budgets, hardware infrastructure and software requirements, et al, for Phase 2 systems design and technical development of required data structures, systems architecture, prototypes, back-end and front-end development, testing, quality assurance, and technical documentation.

11.2.2. Business intelligence planning - quantitative (Hill Strategies Research, ArtsPond)

Jan to Apr 2020

Based on insights from Phase 1, revise strategies and practices for capturing and reporting standard and ad hoc quantitative analytics to guide technical production of financial and statistical modules. Produce and share summaries at public consultations, technical webinars, and via other media.

11.2.3. Business intelligence planning - qualitative (Hill Strategies Research, ArtsPond)

Jan to Apr 2020

Based on insights from Phase 1, revise strategies and practices for capturing and reporting standard and ad hoc qualitative analytics to guide technical production of qualitative analytics experiment.

11.3. ENGAGEMENT PLANNING

11.3.1. Marketing communications and outreach planning (All)

Jan to Mar 2020

Confirm detailed timelines, responsibilities, milestones, budgets for information webinars, marketing promotions, communications, and publicity.

11.3.2. Evaluation and reporting planning (All) Jan to Mar 2020

Confirm detailed shared evaluation and reporting outcomes and measures.

11.3.3. Extended marketing communications and publicity (ArtsPond) Jan to May 2020

Based on insights from Phase 1, continue promotional advertising and publicity campaign to promote awareness of the Artse brand and recruit up to 250 early adopters by conclusion of Phase 2 (100 in Phase 1).

12. INCUBATE Jan to Sep 2020

12.1. TECHNICAL PRODUCTION

12.1.1. Refine Definition of the Problem and Scope Jan 2020

12.1.2. Refine Requirements Gathering Jan to Mar 2020

12.1.3. Wireframing / Prototyping Apr to Jul 2020

12.1.3.1. Workflow Diagrams

12.1.3.2. Users Stories

12.1.3.3. Development Roadmap

12.1.3.4. User Experience Objectives

12.1.3.5. Stakeholder & User Feedback

12.1.4. Technical Development May to Sep 2020

12.1.4.1. Data Structure

12.1.4.2. Systems Architecture

- 12.1.4.3. Coding
- 12.1.4.4. Testing / Debugging
- 12.1.4.5. Quality Assurance
- 12.1.4.6. Data Visualization
- 12.1.4.7. Backend and Frontend
- 12.1.4.8. Quality Assurance
- 12.1.5. **Documentation and Open Source Code Repository Release** Jul to Sep 2020
- 12.1.6. **Alpha Launch (Statistics Module)** Jun 2020
- 12.1.7. **Testing and Quality Assurance (Finance + Statistics Modules)** Jul 2020
- 12.1.8. **Public Beta Launch (Finance + Statistics Modules)** Aug to Sep 2020

12.2. COMMUNITY OUTREACH

- 12.2.1. **Knowledge Sharing: Webinars (ArtsPond, BeMused Network, Plank Design, Hill Strategies Research, Kalogiannides Law, Stephanie Guico)** May and Aug 2020

A minimum of two webinars 45 to 60 minutes in duration each will be presented online, with archival recordings disseminated via YouTube. The sessions will share progress on the organizational, legal, community, and technical development of Artse and provide opportunities for the community to ask questions.

- 12.2.2. **Knowledge Sharing: Blog Articles, White Papers (All)** May to Sep 2020

Each major development partner will be asked to write at least one blog article or white paper sharing insights from their participation in the project. These responses will be made available for free.

- 12.2.3. **Knowledge Sharing: Videos (ArtsPond)** Jul to Sep 2020

ArtsPond will produce one documentary-style trailer video 5 to 8 minutes in length each to share lessons including interviews with partners, users and community members. The video will be shared through YouTube and/or Vimeo.

13. ITERATE Mar to Sep 2020

13.1. EVALUATION

- 13.1.1. **Partner evaluation (All)** Jan to Aug 2020

All partners will contribute to evaluation on an ongoing basis. Full-team progress reviews will be completed quarterly. Smaller committee evaluations in community, organizational, and technical development will be completed monthly. Evaluation will be based on milestones and practices agreed upon in Evaluation and Reporting Planning.

- 13.1.2. **Member/user surveys (ArtsPond)** Jan to Aug 2020

All members/users will be invited to contribute feedback on their experiences and overall assessment of the progress of the initiative through semi-annual online surveys, semi-quarterly informal interviews, and formal group discussions at quarterly governance meetings.

13.2. REPORTING

- 13.2.1. **Closing-cycle audit and reports (ArtsPond)** Jul to Sep 2020

Complete fiscal audit of expenditures from Sep 2019 to Aug 2020. Prepare and submit final fiscal and program evaluation reports to funders and partners. Publish summaries in English and French at DigitalASO.ca / ArtsPond.com.

14. CORE COMPONENTS

15. USER EXPERIENCE