

Project Planning Guide for Interpretive Programs and Products

NPS Interpretive Development Program • Harpers Ferry Center

Project Definition -- What is the scope and nature of the project?

Every project, regardless of its size or complexity, first needs to be carefully defined. Use these questions and bullet points – and the worksheet at the end -- to help you investigate a project's rationale and to identify gaps and additional needs.

Step 1: Identify the need or purpose for this program or product

Why is it necessary or useful to develop this product?

The process of defining a project begins by carefully considering project purpose. Investigate the following questions:

- What is the need for this product?
- What type of service will best meet this need?
 - Orientation/Information – wayfinding, safety, resource protection
 - Interpretation—inspiration, provocation, motivation, appreciation, stewardship, building citizenship skills, building community
- Why develop a product for this need at this particular time?
- Who else has a stake in this project (other park divisions, partners, outside interests) and how do their expectations for this project differ?

Step 2: Determine strategic alignment with the site's interpretive plan

How does your program or product support the site's overall interpretive goals?

All of a site's interpretive services need to work together holistically to advance comprehensive goals for interpretation, education and resource protection. Before developing your product, consider how it will be integrated with the site's current and future interpretive offerings. Study your site's current strategic plan, foundational documents, and interpretive plans and refer to them often during the product development process. List how your product fits into the site's:

- Purpose
- Significance
- Interpretive themes
- Management goals
- Desired visitor experiences

Step 3: Identify audience characteristics

Who will be attending, using or engaging with this interpretive program or product?

Create an audience profile by answering the following questions:

- Who are the target audience members and what knowledge and expectations are they likely to have when they arrive at the site?
- Is their visit “virtual”? How will this affect their approach to the product?
- How much time do they have?
- When would this information be most useful: before, during, or after experiencing the resource?
- What primary languages, literacy patterns, ages, and group types?
- What are their motivations for coming to the site?
- Are there cultural differences to take into account?
- How will all visitors be provided access to this program or product? Will the product be universally designed, or will alternative media need to be developed for visitors with visual, auditory, mobility, or cognitive disabilities?

Step 4: Clarify/write interpretive goals and desired outcomes

Based on Steps 1-3 above, what will your program or product attempt to accomplish?

For a program or product that is intended to be interpretive (vs orientation or information), what are the desired interpretive goals or outcomes? It’s important to think and plan intentionally for this -- and put it in writing to help your project stay on track, revising and adjusting along the way as needed. All interpretive products should address three types of overarching needs and interests:

- o Audience – How will the product address the needs/interests of the audience and enrich or enhance their experience? How will it help the audience explore personal relevance and meaning?
- o Site/agency – How will the product address the management needs or mission-related goals of the site or agency? (i.e. resource protection, preservation, stewardship, safety, community engagement)
- o Society – How will the product address the needs or issues of society? Will it connect the site’s story to broader societal issues, or will it provide opportunities for skill-building (i.e. problem solving, active listening, empathy, considering diverse perspectives, scientific, historical or cultural literacy, etc)?

Step 5: Identify thematic focus

What overarching theme question will the product explore with the audience?

Based on the product's purpose and goals, begin to identify a thematic focus. Effective audience-centered interpretation begins with an [essential theme question](#) (vs a theme statement). What relevant question will the product help the audience explore? Draft a preliminary theme question that can begin to provide focus and guide development. You should expect to refine and hone your focus as you share your ideas with collaborators and begin to gather content. An essential question is exploratory, generally without a right answer, so your interpretive product might only delve into one aspect or nibble at the edges, but it's the big "so what" that guides your design.

(See [Examples of Goals and Theme Questions](#) for Steps 4 and 5)

Step 6: Select the appropriate interpretive medium

What is the best medium for the job?

Although the interpretive medium may have already been selected for your project, you should begin developing an awareness of the [characteristics of personal services and different types of interpretive media](#).

Selecting the appropriate medium for your product involves matching the medium type with the identified interpretive goals and themes, audience characteristics, and available resources.

Step 7: What will you need in order to plan, design and develop this program or product?

Before launching your project, consider what you will need in the following categories:

Collaborators – Effective interpretation is the result of effective collaboration, even for short programs or small media projects. Who will you invite to your "team"? In addition to others who can supplement your skills, who will you go to for testing ideas and assumptions and for critical feedback on interpretive components? Who can contribute different valuable perspectives? How can you engage peers, experts, and potential audience members in your development and feedback process?

Skills – Do the skills needed for this project match the skills you have? Do an honest self-assessment, and consider how to fill skill gaps. Do you have the time to learn additional skills and is that a realistic approach? Or should you seek collaborators who already have good skills to complement your own?

Time – Many new projects bog down or fail due to poor estimating of time needed and time constraints. Is the scale of the project appropriate to the amount of time available and the ability to get the job done? Always remember to develop a reasonable schedule that allows plenty of time for review and revision, and is respectful of the time investment of collaborators.

Budget – At the beginning of any project, the project leader needs to know how much money is available, where the funding is coming from, and if there is a deadline for spending. This budget information will determine the types of things for which you can use the money and what the process might be for spending it. Remember to track your budget as your project unfolds.

Content resources -- What resources do you anticipate you will need to develop the content for your product? Examples of content resources include objects/artifacts, photos, first-hand accounts, stories, historical quotes, video, music, maps, graphics, physical site locations such as historic buildings or natural features, primary research documents, research databases, etc. Identify collaborators who can help you locate and acquire resources along with their source and use-rights information.

Presentation or production needs – Plan ahead for the resources and/or collaborators you'll need to stage/present your program or produce your media product.

Step 8: Think ahead to the project's requirements for intellectual property, accessibility, compliance and evaluation

How will you remain accountable to these needs, and who should be on your team to help you?

Intellectual property – Every photograph, piece of artwork, artifact, video clip, and quotation has an original source. Acquiring the rights to use these items, tracking and documenting the rights to use them, and properly crediting sources are important requirements in the planning process.

Accessibility – Interpretive projects should incorporate basic accommodations from the earliest stages of the planning process. Accessibility is mandated by law and ensures that everyone can participate and enjoy your site's interpretive opportunities.

Compliance – Will your project have an impact on the natural and physical environment? Compliance is the process of evaluating projects to determine the potential effects to the environment in accordance with the National Environmental Policy Act. Find out if, when and how to submit your project for compliance early in the process.

Evaluation – From the outset of your planning, investigate what evaluation strategies are appropriate for the scope and complexity of your project (Front-end, Formative, Summative). Evaluation is about asking questions of our audiences and potential audiences. This can happen in informal as well as formal ways. Evaluation is an essential accountability tool.

WORKSHEET – Project Planning for Interpretive Programs and Products

Spend some time thinking about the important questions below. Refer to the information in the handout above. Jot down your notes and ideas for each question. Share your preliminary plan with your collaborators or colleagues and ask for honest feedback and additional ideas.

Step 1: Identify the need or purpose for this program or product

Why is it necessary or useful to develop this product?

Step 2: Determine strategic alignment with the site's interpretive plan

How does your program or product support the site's overall interpretive goals?

Step 3: Identify audience characteristics

Who will be engaging with this program or product?

Step 4: Clarify interpretive goals and desired outcomes

What will the product attempt to accomplish? Write a goal that addresses the needs/interests of each of the following stakeholders:

Audience

Park or agency

Society

Step 5: Identify thematic focus

What overarching essential theme question will the program or product explore?

Step 6: Select the appropriate interpretive medium

What is the best medium for the job?

Step 7: What will you need in order to plan, design and develop this program or product?

Consider what you will need in the following categories:

Collaborators

Skills

Time

Budget

Project resources

Presentation or production needs

Step 8: Think ahead to the project's requirements for accountability

At the beginning and throughout the process, how will you remain accountable to these needs, and who should be on your team to help you?

Intellectual property

Accessibility

Compliance

Evaluation