

Planning template and example

1. Objectives

A statement(s) about desired outcome(s). Think about why you are doing the project.

For example:

Background: There are 5000 visitors to this site each year and this is expected to grow due to road improvements. A platform has been built around the trees but some people are climbing the barrier and going right up to the base of the tree causing damage to the roots. People need to know that this tree is a valuable, unique remnant of what was once an extensive kauri forest. It needs to be looked after and treated with respect if it is to survive.

Objectives:

- Visitors will understand that if they walk off the track they will damage the roots of the kauri and the health of the tree.
- Visitors will gain an appreciation of the volume of kauri forest lost due to milling.

2. Audience(s)

Identify **who are your likely audiences** and **who is your target audience**.

The main users are school groups, bus tours and free-independent travelers (50% New Zealanders/50% international). Groups are kept under control by guides/teachers but the free travelers are climbing the barriers to get closer to the trees and are damaging the roots. We need to target this group in particular.

3. Media

A review of the different options that could be used at this site and a description of the most suitable (justify choice).

Staff cannot be at the site on a permanent basis so static options will be used. A brochure is not feasible given the distance from any outlet. A sign on site will be read by most visitors if there are no large groups there at the same time. In the first instance we will try a sign to see if it helps to reduce the damage that is occurring

If you decide a sign is the best option

4. Theme

The foundation block for building up your storylines.

'Our forest giants are fragile'.

5. Validity of information

Indicate the length of time you could expect the sign to remain valid.

This information should remain valid indefinitely. However, we would expect that the sign should be replaced within 5 – 7 years so that we can update the design and any progress made due to management of the impacts.

6. **Situation**

Describe the physical setting, likely impacts and expected use.

The sign will be located on the existing platform to the left of the tree so that it is easily seen but does not obstruct the view. The space available means that the size of the sign should be 1200 mm (high) by 700 mm (wide). It is likely that when larger groups are present not everyone will be able to use the sign, however this is only a problem on rare occasions and the situation is acceptable at this stage. There is no vandalism problem at present and the site is very sheltered from the elements. Consequently we should look at a digital print with graffiti guard as the most affordable, practical option in these conditions.

7. **Other developments**

Identify associated sites or developments that will affect the way that this project is managed.

This is the only publicly accessible kauri in this area. There are no other priority areas for visitor development in the vicinity so the sign can be a stand alone design. However, the company logo should be used on the sign in a similar position as it is on other company signs.

8. **Resources and cultural protocols**

What resources are available to help the researchers, writers and designers. Has the required consultation been done / systems set up and used

Maps of the historical kauri coverage are available from our draughting department. Fred Bloggs who lives locally (address) was a logger in this forest in the 1950s. He is happy to talk about his experiences. There are no known historical photos from the area. Local iwi (.....) have been contacted about the proposed sign and are supportive. They would like to have their local name for the tree used on the sign. The contact is Daniel Maru.

9. **Completion**

Give a completion date and describe any constraints such as staff absences.

The sign should be completed by the end of our financial year. The project manager however will be away on leave from the end of May so the design work will have to be completed and approved before she leaves.

Who needs to be consulted and at what stage? Are there systems in place?

10. **Evaluation**

Describe any evaluation that will occur (if any).

As this is only a single sign, unconnected to any other developments we will not carry out any concept testing. However, we will use volunteers to talk to visitors on two days over the next two weeks. They will ask visitors what information they would like to know about the kauri and this will

be incorporated into the sign if possible. If there is an unexpected focus that cannot be incorporated into the planned sign we may look at developing a second sign to cover that information need in the next financial year.

11. **Allocation of work**

Describe what work will be done in-house and what will be allocated to contractors.

Jane Smith will be the project manager. She will co-ordinate any necessary research, the collation of resources and the text development in-house. Due date; end of February
Interp Works will coordinate the sign design and production. Due date: end of May.

Jane will be responsible for approving the design work.

Installation will be done by an in-house field team. To be installed by the end of June.

12. **An interpretation brief**

This should be provided to anyone contracted to complete all or part of the project. It should include the information in your plan AND:

- A clear description of the final product,
- A schedule that defines milestones (e.g., approval of text, approval of design),
- Role identification
- Payment arrangements, including what happens if the original brief changes over the course of time (e.g., if staff cannot complete the text development and the contractor is asked to take it on).
- If possible include quality standards.