

INTERPRETIVE PLANNING - TOOL #1

Roles, Responsibilities, and Milestones

ROLES AND RESPONSIBILITIES

Forest Customer

Role

Establishes and communicates project goals and scope of work, and makes decisions regarding project objectives (schedule, budget, and quality).

Responsibilities

- Approves Project Plan and Agreement.
- Assigns Forest Liaison.
- Assures understanding of project goals and expectations.
- Evaluates proposed changes in project objectives, consults with Project Manager to determine impacts, and approves changes.
- Participates in key project team meetings that normally coincide with major project milestones.
- Approves final product.

CDI Project Manager

Role

Leads, coordinates, and communicates the work of the Project Team and serves as the CDI point-of-contact from project inception to completion.

Responsibilities

1. Administrative

- Manages and is accountable for meeting project objectives (schedule, budget and quality).
- Negotiates changes in project objectives with Forest Liaison.
- Works with CDI Manager and Forest Liaison to select project Team Members.
- Initiates and develops Project Plan and Agreement.
- Develops project planning/ design/ construction/ post-construction process, documents in the Project Plan and Agreement, and ensures compliance.
- Submits monthly status report to Forest Liaison, CDI Manager, and project Team Members.

2. Technical

- Serves as lead designer/ writer (typically).
- Coordinates production and interdisciplinary activities of project team.
- Ensures applicable design standards are used.
- Develops contract specifications and serves as COR.

Forest Liaison

Role

Serves as point-of-contact for the Forest and Project Team Members and represents the Forest staff.

Responsibilities

- Represents the Forest Customer.
- Communicates project progress to Forest Customer and staff.
- Coordinates review of submittals with Forest Customer and Project Team.
- Provides clear, consolidated, and timely feedback and approvals to Project Manager.
- Ensures that NEPA compliance is complete and applicable permits and right-of-ways are obtained.
- Ensures that decisions and changes remain within the scope of work to ensure that the project stays within budget.
- Provides timely briefings to Forest Customer and advises of needed decisions.

Project Team

Role

Produces products and provides services that meet project objectives.

Responsibilities

- Coordinates production and interdisciplinary activities.
- Communicates progress of work and issues to Project Manager in a timely manner.
- Ensures adherence to applicable design standards, and health and life safety codes and regulations.
- Mentors/ trains less-experienced project team members.
- Follows approved Design Narrative (if applicable) and Project Plan to keep project within scope and budget.

MILESTONES

Over the course of the project, there will be several review points at which time the Forest Customer, Forest Liaison, and Project Team have the opportunity to provide feedback to the CDI Project Manager. While each project is different and should be tailored to meet the needs of each customer, the following guidelines can be used.

For Interpretive Planning Projects

Preliminary Development and Review

Identify the purpose and need. Articulate the scope and complexity. Determine the type and amount of partner and public involvement.

30% Review

Approve plan goal and objectives, structure (table of contents), audience analysis, existing interpretive inventory, and statements of significance. Approve themes, subthemes, and interpretive objectives.

60% Review

Make recommendations for media and interpretive services, implementation strategy, evaluation and monitoring techniques, funding, staffing responsibilities, and appropriate appendices.

90% Review

Approve recommendations. Make final edits and approve packaging and delivery plan.

Final

Approve and sign final plan. Print and distribute.

For Interpretive Panels and Publications

Preliminary Development and Review

Identify the following:

1. Target audience
2. Interpretive objectives
3. Size and number (pages or panels)
4. Primary theme and storylines
5. For panels - framing and mounting structures

30% Review

Approve design template (color palette, graphic styles, illustration type, and fonts), draft text, draft images, and map concepts. Ensure that design and text are meeting interpretive objectives.

NOTE: For complex projects, or in situations where a design template has never been established for the forest or site, it may be desirable to design and approve a template prior to the 30% draft.

60% Review

Approve nearly final text, images, maps, and their layout.

90% Review

Approve final text, final images, maps, and graphic elements; verify specifications for contracts.

Final

Approve final product and prepare for printing/fabrication.