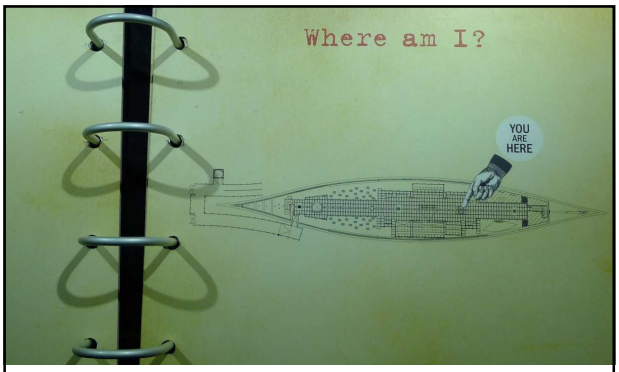


Interpretive projects delivery & evaluation

Michal Medek, michal@medek.us

Project delivery

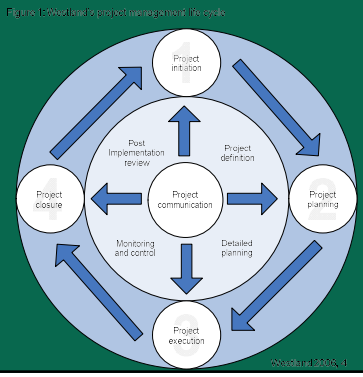
• Heritage interpretation projects use standard project management methods.

• These methods are refined in order to meet specific aims of heritage interpretation: mission based communication, visitors' behaviour shift, audience development, public funds...

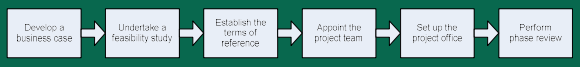
=> standard methods provide framework for HI projects

=> documentation is specific to the heritage interpretation field.

Project delivery



Initiation stage

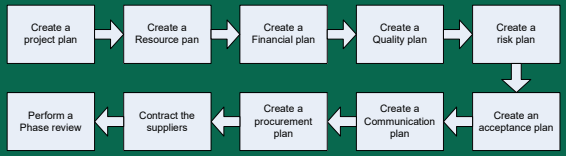


Westland 2006, 5

1. Interpretive plan (including audit of visitor experience)
2. Feasibility study (often part of the interpretive plan)
   1. Description of the problem
   2. Alternative ways of tackling the problem (including achievability assessment and estimated costs)
   3. Risk assessment and suggestion of the preferred option
3. Setting vision, aims, objectives, roles and responsibilities, choosing evaluation methods.

Planning phase

Figure 1: Westland's project planning activities



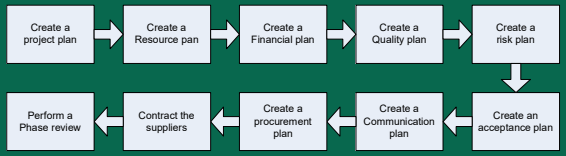
Westland 2006, 7

PROJECT BRIEF contains:

1. Acceptance criteria:
   - Definition of projects' milestones
   - Acceptance criteria for deliverables
   - Methods of assessing quality of deliverables
   - Acceptance procedures

Planning phase

Figure 1: Westland's project planning activities

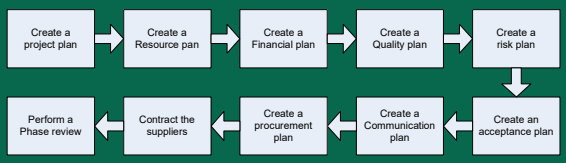


Westland 2006, 7

2. Procurement plan:
   - Definition of objectives and scope of work (including coordination meetings with a customer)
   - Justification of the way of execution (e.g. why the internal capacities are not used)
   - Assessment of the market (ability to take part in a tender)

Planning phase

Figure 1: Westland's project planning activities



Westland 2006, 7

Tenders:

- Comissioning tenders
- RFI – request for information
- RFP – request for proposals
- Assessment of the bids and contracting

Project team:

CLIENT TEAM	PROJECT TEAM	PROJECT MANAGEMENT TEAM	DESIGN TEAM	VISITOR SERVICES & BUSINESS DEVELOPMENT WORKING GROUP	RESEARCH GROUP	PUBLICATIONS GROUP	COLLECTIONS GROUP	INTERPRETATION GROUP	COMMUNICATIONS GROUP
Chair	Chair	Chair	Chair	Chair	Chair	Chair	Chair	Chair	Chair
+ 30 people	+ 15 people	+ 6 people	+ 6 people	+ 15 people	+ 13 people	+ 6 people	+ 7 people	+ 6 people	+ 10 people
								Interpretation design consultants	
								Lighting design consultants	

Stanley Mills

Stanley Mills

Pre Qualification Questionnaire for Companies Expressing an Interest for Exhibition Design and Build Contract

Historic Scotland, November 2004

Contents

Stanley Mills

STANLEY MILLS PROJECT BRIEF EXTRACT

1 **PROJECT BACKGROUND**

1.1 **Stanley Mills**

1.1.1 The mills are located on a plateau where the River Tay forms an incised meander in the landscape. The slopes of the river are richly wooded and are surrounded by gently undulating farmland. This fine landscape provides the setting for the most powerful river in the UK. The power of the river and the change on water level are the two principal reasons for the selection of this location for the mills and the village.

1.1.2 In August 1784 the Stanley Company was established to build 'very large cotton works' at Perth, 'under the patronage of Messrs. Dempster, Arkwright and some capital merchants and Manufacturers' and at the instigation of the Duke of Atholl. It was to be built on the site of a corn mill, fed by a plentiful supply of water diverted from the River Tay, through a tunnel driven half a mile through the Stanley peninsula in 1729 to harness the power in the rapids at Campsie Linn.

1.1.3 The products changed over the years, but fundamentally the mills were used to spin yarn, mostly cotton, and to weave fabrics – everything from

Stanley Mills

Tenders:

STANLEY MILLS BELL MILL AND MID MILL PROJECT
INTERPRETATION DESIGN AND BUILD CONTRACT

TENDER DOCUMENTATION

CONTENTS

Stanley Mills

Blind contract:

STANLEY MILLS PROJECT - INTERPRETATION DESIGN AND BUILD CONTRACT

GC/WORKS/1 TWO STAGE DESIGN & BUILD (1999)

TENDER AND TENDER PRICE FORM

TENDER

Works: Stanley Mills Project Interpretation Design and Build

Site: Stanley Mills, Stanley near Perth

To be returned by time and date to address.

1 We have examined GC/Works/1 Two Stage Design & Build (1999) incorporating GC/Works/1 Amendment 1 (2000), and the following documents:

(a) Abstract of Particulars and Addendum;

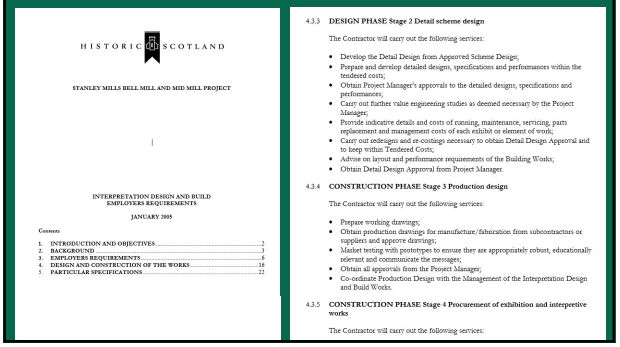
(b) Supplementary Conditions and Annexes (if any) referred to in the Abstract of Particulars;

(c) Employer's Requirements;

(d) Outline Health and Safety Plan (and confirm that we will provide a statement and details of how we plan to implement and develop it, together with details to establish our competence and resources to comply with the requirements and prohibitions imposed upon us relative to health and safety in the execution and/or management of the Works); and

(e) Other documents as listed in the Employer's Requirements

Stanley Mills – tender documentation



HISTORIC SCOTLAND

STANLEY MILLS BELL MILL AND MID MILL PROJECT

INTERPRETATION DESIGN AND BUILD
EMPLOYERS REQUIREMENTS

JANUARY 2005

Contents

1. INTRODUCTION AND OBJECTIVES 2
2. BACKGROUND 3
3. EMPLOYERS REQUIREMENTS 6
4. DESIGN AND CONSTRUCTION OF THE WORKS 16
5. PARTICULAR SPECIFICATIONS 22

4.3.3 **DESIGN PHASE Stage 2 Detail scheme design**

The Contractor will carry out the following services:

- Develop the Detail Design from Approved Scheme Design;
- Prepare and develop detailed designs, specifications and performances within the tendered costs;
- Obtain Project Manager's approvals to the detailed designs, specifications and performances;
- Carry out further value engineering studies as deemed necessary by the Project Manager;
- Provide indicative details and costs of running, maintenance, servicing, parts replacement and management costs of each exhibit or element of work;
- Carry out redesigns and re-costings necessary to obtain Detail Design Approval and to keep within Tendered Costs;
- Advise on layout and performance requirements of the Building Works;
- Obtain Detail Design Approval from Project Manager.

4.3.4 **CONSTRUCTION PHASE Stage 3 Production design**

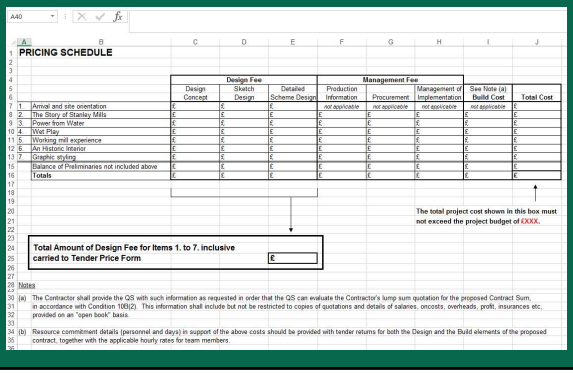
The Contractor will carry out the following services:

- Prepare working drawings;
- Obtain production drawings for manufacture/fabrication from subcontractors or suppliers and approve drawings;
- Market testing with prototypes to ensure they are appropriately robust, educationally relevant and communicate the messages;
- Obtain all approvals from the Project Manager;
- Co-ordinate Production Design with the Management of the Interpretation Design and Build Works.

4.3.5 **CONSTRUCTION PHASE Stage 4 Procurement of exhibition and interpretive works**

The Contractor will carry out the following services:

Stanley Mills – bidding framework



PRICING SCHEDULE

		Design Fee			Management Fee				
		Design Concept	Sketch Design	Detailed Scheme Design	Production Information	Procurement	Management of Implementation	See Note (a) Build Cost	Total Cost
1.	Arrival and site orientation	£	£	£	not applicable	not applicable	not applicable	not applicable	£
2.	The Story of Stanley Mills	£	£	£	£	£	£	£	£
3.	Power from Water	£	£	£	£	£	£	£	£
4.	Wet Play	£	£	£	£	£	£	£	£
5.	Working mill experience	£	£	£	£	£	£	£	£
6.	An Historic Interior	£	£	£	£	£	£	£	£
7.	Graphic styling	£	£	£	£	£	£	£	£
	Balance of Preliminaries not included above	£	£	£	£	£	£	£	£
	Totals	£	£	£	£	£	£	£	£

The total project cost shown in this box must not exceed the project budget of £XXXX.

Total Amount of Design Fee for Items 1. to 7. inclusive carried to Tender Price Form £

Notes

(a) The Contractor shall provide the QS with such information as requested in order that the QS can evaluate the Contractor's lump sum quotation for the proposed Contract Sum, in accordance with Condition 10(b)(2). This information shall include but not be restricted to copies of quotations and details of salaries, oncosts, overheads, profit, insurances etc, provided on an "open book" basis.

(b) Resource commitment details (personnel and days) in support of the above costs should be provided with tender returns for both the Design and the Build elements of the proposed contract, together with the applicable hourly rates for team members.

Why evaluation

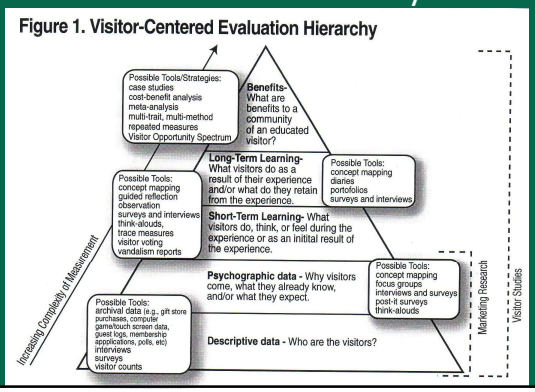
„Evaluation … is time consuming and expensive. Yet without it decisions are difficult to make, money is wasted, mistakes are endlessly repeated and success is hard to measure."

Sue Wilkinson

South East Museums Education Unit, 1998

- Accountability
- Justification
- Benchmarking
- Professionalism

Evaluation hierarchy



Types of evaluation throughout project

What we evaluate	Before	During	After delivery
Plans	Front-end evaluation		
Mock-ups		Formative evaluation	
The real thing			Summative evaluation

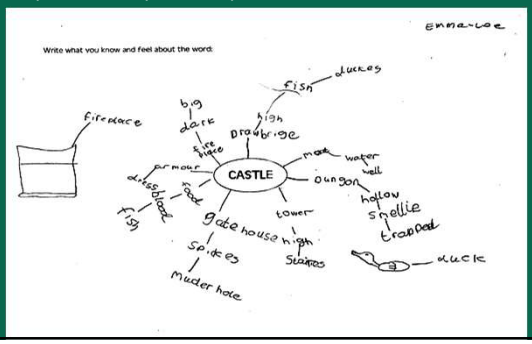
Miles v Bicknell & Farmelo (1993, 32)

Most common evaluation techniques (mostly qualitative research)

- Observation (unobtrusive/participant)
- Informal conversation
- Unstructured interview
- Structured interview
- Group discussion (Focuse group)
- Diaries
- Critical appraisal
- Concept mapping

Pre & post testing

Example – conceptual maps



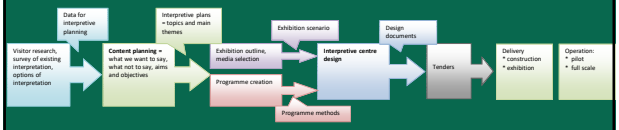
Triangulation

Example – evaluation of excursions for schools provided by the National Trust (UK):

- 600 000 exkursions a year
- evaluation methods:
  - observation by experts
  - conceptual maps (students)
  - phone inteviews with teachers
- weak points: evaluation was undertaken with different time-distance from the programme, it was not evaluating programmes in their complexity
- outcomes: Good Practice Guide for lecturers, training for lecturers, preliminary programme assessment incorporated into the Guide

Excercise

- Imagine you prepare project of a visitor centre in a national park – to which phases you comprise evaluation?



- How would you justify evaluation costs?

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