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Design planner: An Interactive guide for design planning

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DESIGN PLANNER®

an interactive guide for design planning

ROCHESTER INSTITUTE OF TECHNOLOGY

A Thesis submitted to the faculty of
The College of Fine and Applied Arts
In candidacy for the degree of
MASTER OF FINE ARTS

by Roy J. Prochaska Jr.
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I, Roy Prochaska Jr., prefer to be contacted each time a request for production is made. I can be reached at the following address:
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Thank You

Bette Lu & Roy Prochaska for supporting my every whim with enthusiasm, and for forgiving my mistakes, as well as helping me right my wrongs. For never telling me I 'couldn't.' For simply, and literally, always being there.

Roger Remington for all that he has taught me, and his neverending passion for learning and teaching. For his personal and professional support.

Deborah Beardslee for her keen eye with regard to detail. For her personal and professional support.

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Becky Eddy for all of her help and moral support.

Dr. Joanne Szabla for all of her help and moral support.

Robert Keough for his support.

James VerHague for his support.
Dedication

This thesis is dedicated to those persons everywhere who had the courage to set a goal and sacrifice to see the dream brought to fruition.

To those who uphold the value that hard work is good.

To those who have new ideas and put forth the effort necessary to better a given situation.

To those who believe in a well-rounded education and recognize the importance of an interdisciplinary approach to learning.

To those who enjoy thinking.
Preface

As the time grew near to formulate a thesis project that would be the culmination of my graduate education at Rochester Institute of Technology my thought process turned inward to seek out what it was that I could contribute to the field of Graphic Design. What was it that interested me? What about the profession hadn't yet been addressed? What resources were available here at RIT that would facilitate a truly unique and powerful Graduate Thesis? Most importantly, what was the problem I would help to solve through an entire year of intense investigation?

My first thought was that 'there was an excessive amount of ineffective / bad design currently being produced.' How could I change that situation? With the help of my major professor, R. Roger Remington, I was able to articulate the problem in the form of a thesis project. (Appendix 1 & 2) Considering the great wealth of resources RIT had to offer in the areas of interactive media, design evaluation, project planning and management, and the department's emphasis on design as a problem solving process, I chose to develop an interactive media application dealing with design planning and management.

Through the development of Design Planner I felt that, ultimately, I could improve the quality of graphic communications by providing a planning tool for designers, students of design, and professionals, to assist in developing a project proposal for any creative endeavor. The application would help users adopt a problem solving approach, and define goals, objectives, success indicators, and processes and strategies of implementation. Through the proposal development process a designer would become very well acquainted with the problem at hand, the constraints, and the communication objectives of the client. As a result the designer would be better prepared to develop a truly effective solution for the problem at hand.

It seemed that perhaps the problem was not in the degree of skill designers had, but rather how they applied their knowledge to each creative task. Measuring the effectiveness of a creative product is difficult at best, and impossible if certain criteria aren't established that can be used to evaluate the product's relative success. By developing a detailed proposal for a project task, a designer is helping him/herself to better understand the problem at hand, the client's needs, the needs of the audience, the communication objectives, the constraints, etc. Through this process a designer is able to prioritize the activities necessary to achieve success in the final solution. Prioritization allows for focus on key areas of importance, and the development of goals, objectives, and a process by which to meet the demands of the task at hand. Focus and emphasis are then placed on the critical issues relating to an effective solution for the problem, and success indicators relative to each objective are then formulated.
Introduction

Design Planner®, is an interactive planning tool for the process of design. It is a computer based application that was developed using HyperCard 2.0 authoring software by Apple®. The application runs on a Macintosh workstation, and an accompanying manual has been developed to assist users when working with the interface. The application is available for use at the Media Resource Center in the Wallace Memorial Library on the campus of Rochester Institute of Technology.

Design Planner is a tool that enables users to develop a project proposal for any given task. The application functions as both a learning and a production tool. The process of writing a proposal leads users through informative text with examples that detail the necessary elements within each component of a successful proposal. By using the application users are taught how to formulate an effective project mission statement, goals, objectives, indicators of success, and processes and strategies of implementation. The interface allows users to actually enter their own project-specific text for each of the aforementioned steps in the proposal. Through a dynamic and interactive process users of the application have the option of making revisions to their proposal at all times and of saving their work as a HyperCard stack, or as a text file for use in a word-processing application. Users can also print a finished proposal through the interface, print copies of important textual information, and print certain cards from the application for use as guidelines when a workstation is not available.

Design Planner begins with an introduction that explains the application and the way to navigate through the information. As well, it includes animated illustrations that demonstrate the broader context of project planning, evaluation, and management activities in general. (Appendix 8.1) Also included in the introduction is an animated sequence depicting the various stages in the process of developing a proposal with the application and the way each stage in this process supports the others. Users are also exposed to an organizational flowchart that illustrates the many components within the application. The flowchart also functions as a navigator map by allowing users to access specific information by clicking on the area they wish to view.

After completing the introduction users are prompted to move to the first step in the proposal development process: the mission statement. By clicking buttons on the screen the user moves in a linear fashion through textual information describing the process of articulating an effective project mission statement. At the conclusion of the informative text the user is allowed to write a mission statement for his/her particular project. A template structure for an effective mission statement is provided for reference, as well as a summary of the previous information. Options that allow the user to print the card for use as a
notetaking device away from the interface, see an example, or review the informative text are also available at this time. Upon writing a mission statement the user is prompted to move on and learn about writing an effective goal. As in the mission statement area, the process of learning what makes a goal successful and how to write one is repeated through textual information. This process is standardized throughout the five major components within the application. A standardized operation which the application provides is the return of previously written information. In other words, after writing a mission statement and learning how to articulate an effective goal, the user is again allowed to write project specific information, goals in this case, with the aid of a template. The mission statement the user has just written is then provided for reference to ensure goals are written to satisfy the mission. (Appendix 8.3) This process is standard throughout the application. In the next steps in the process the user will write: 1) objectives to satisfy the goals, 2) indicators of success in relation to the objectives, and 3) a process and strategy of implementation that will define how the designer plans to achieve all of the above. This function is very powerful because it establishes a problem solving approach to the design process, ensuring that the designer addresses each issue with the overall project objectives in mind. This process subdivides the project into several smaller problems to be solved sequentially and, by doing so, produces a natural hierarchy.

After completing the five major components of the application and having written a mission statement, goals, objectives, success indicators, and a process and strategy of implementation, the user can view the proposal in its entirety. The user can also title the proposal or make any necessary changes. Also, the user can print a copy of the document, save it for later use, or move back into the body of the application for instruction in any area, and then make revisions. It should be noted that the process outlined above is the anticipated interaction for a first time user. Through the navigator map a user may access, at any time, any part of the application's functionality or text.

Design Planner utilizes the metaphor of building to illustrate the dynamic process established in the interface. A brick was chosen as the appropriate metaphor because of its adaptability. The brick represents one small part of a larger whole. This provides focus at the micro level. When seen in context it represents the whole, or the broader picture, at the macro level, while retaining the meaning of the single unit. Finally, the brick inherently represents a building process, an orderly evolution from one small entity to a much larger outcome. The metaphor is applied throughout the interface and plays a major role in the identity system, and the organizational structure of each visual layout including the Macintosh screen design, the user manual, the promotional posters, and also this document.
# Table of Contents

Preface IV
Introduction V
Table of Contents 1

Research and Development 3
A. Preliminary thesis meetings
B. Input from committee members
C. Input from outside sources

Identity System Development 5
A. Research / process
B. Identity Mark development
C. Variations on the mark
D. Applications of the mark

Preliminary development of Design Planner Application 7
A. Organizational flowcharts
B. Development of card layout
C. Development of functionality

Development of Application 9
A. Introductory animated sequencing
B. Textual information inputted
C. Multi-level writing approach applied
D. Refinement

Exhibition 11
A. Application
B. Display

User Manual Development 12
A. Organizational method
B. Informational content

Evaluation Procedures 13
A. User testing
B. Refinement

Conclusions 14
Glossary 15
Bibliography 18
Appendix

1. Preliminary Thesis Proposal
2. Thesis Proposal
3. Flowchart Development
4. Project Timeline
5. Identity Mark Development
6. Final Identity Marks
7. Text Development and Revision
8. Design Planner® Application
8.1 Introduction
   Navigator Map
   Creative Planning Process Diagram
   Design Planner Process Diagram
8.2 Mission
8.3 Goals
8.4 Objectives
8.5 Indicators of Success
8.6 Processes and Strategies of Implementation
   Timeline
   Budget
   General Process
8.7 Print Proposal
9. Exhibition
10. User Manual Development
12. Design Planner® Software
Research and Development

The Thesis Committee met formally for the first time on 10/8/91 for the purpose of defining the project and opening a dialogue. Those present were: Deborah Beardslee, Mark Collien, Dr. Charles Plummer, Roy Prochaska Jr., and R. Roger Remington. It was decided that the project outcome would be an interactive media application developed using HyperCard 2.0 that would approach the evaluation of design as a process of writing a project proposal defining relevant goals, objectives, and processes and strategies of implementation. The task at hand was to develop an interface that would allow users to improve the effectiveness of their own design product through the use of a design project planning and management tool.

Each committee member was asked to express concerns about the project at this early developmental stage in order to fully utilize the expertise each person brought to the group. Dr. Plummer was intrigued by the project itself and seemed most interested in the synthesis and application of several evaluation strategies within the application. He also stressed that the final interactive outcome should adopt a dynamic / cyclical process of revision and development. All agreed the final solution should utilize an appropriate metaphor; however, many reservations were expressed. Mark Collien was most concerned with the effective use of metaphor, citing many instances of improper applications. Deborah Beardslee suggested (and all agreed) that a simple to complex approach would be the best way to gradually lead users into the application. The ultimate solution seemed to be structuring the information in multiple levels from very simple to complex. Roger Remington mentioned many concerns with the interface development. One was that the application focus on the process of designing rather than on the design product itself, and that the final solution be very clearly targeted to do one thing only, and do it well. It was the opinion of the committee that parameters needed to be established in order to ensure all efforts were focused on accomplishing the project's specific objectives.

At the conclusion of the meeting I made a careful review of all that had been discussed and began my research. (Appendix 2, 3, & 4) Dr. Plummer was able to provide several documents on evaluation procedures and, also, to refer me to other sources of information. Roger Remington and Deborah Beardslee also provided very useful information throughout the project. My research focused on; design evaluation, design process, and system development and analysis (including project goals, objectives, success indicators, and processes and strategies of implementation), but also included interactive media design applications, graphic design criticism and education, multi-level writing, evaluation methods, and problem seeking and solving techniques.
Professor Jorge Frascara of the University of Edmonton at Alberta, CA and I share a very similar philosophy toward effective design and, as a result, I contacted him for possible input in regards to the project. He was more than gracious in granting permission to quote his work, and in taking the time to provide me with documentation of many yet unpublished articles he had been working on.
Identity System Development

An identity system was necessary in order to reinforce the metaphor adopted within the interactive application and provide a common visual context between the computer interface and printed materials. The early development of the identity mark included the use of several problem solving tools: key word listings, visual and verbal representational matrices, identity mark classification systems, and mind-mapping. (Appendix 5) By using the tools mentioned above I was able to decide on an appropriate visual metaphor for the actual Design Planner application.

The metaphor needed to illustrate the theory adopted by the application with regard to the process of design: that of a step by step problem solving approach to reaching an effective visual communication solution. I chose a brick as the metaphor due to what it could signify and, also, because of its inherent adaptability. A single brick represents a piece of a larger whole, seemingly small in stature, yet of great importance to the overall structure. Each brick performs a distinct role in support of the whole. A group of bricks represents a finished product rather than the process used to achieve the result. Lastly, the brick itself represents part of a process, a process by which many small pieces are brought together to form a whole. The process is dynamic and cyclical, beginning with one brick, then two, then three, etc. until the final solution is reached.

A system of bricks relates to the process utilized by the Design Planner application by providing a visual representation of each sub-section of the application, while also providing insight as to the many parts functioning together. (Appendix 8.1) Each area of the application is a separate entity in its own right, but also functions in context with the other elements. No one area is of more importance than another, and eliminating any step in the project planning and management process used by Design Planner would render the application ineffective. A single brick relates to an individual step in the process. A group of bricks represents the completed proposal with many interrelated parts, and the stacking of bricks relates to the dynamic project development process. Each category or brick exists to support another.

The final identity mark was the result of a careful ideation and image development process. (Appendix 6) The process involved experimentation with possible solutions to integrate the project's name "Design Planner" with a single rectangular form, representational of a brick. Later this unit was extended into a system of rectangular forms. Experimentation involved utilizing typographic variables with other formal considerations such as line, shape, figure / ground relationships, and continuity in an attempt to establish the successful integration of form and typography. After a successful visual relationship had been established, I began to develop variations on the mark
that would unify an identity system comprised of several applications of the mark.

Flexibility was an issue of concern in the development of the identity system. The identity needed to be consistent, recognizable, and adaptable to an interactive computer application, printed promotional posters, a user manual, and the final thesis documentation; therefore, after experimentation with variations of the final mark, two final solutions were realized. The final mark solutions consisted of: 1) an opaque rectangular form with the letters 'Plan' reversed out in white followed by positive letters 'ner' below a positive 'Design', and 2) the rectangular brick form implied by retaining the top horizontal border with a thin rule, and the right edge of the brick implied with a somewhat thicker rule. This 'line' (2) version of the mark proved to be aesthetically cohesive and recognizable as a variation on the 'form' (1) version of the identity mark.

(Appendix 6) It also retained the unity established between the implied form and the typography. This solution was then applied in the user manual.

(Appendix 11)
Preliminary Application Development

An organizational flowchart is an essential component in the development of any interactive media application. It is necessary due to the choice of media/ a computer. Unlike traditional media an interactive application is not a tangible / physical product as is a book or a poster. An interactive application lives in a non-linear, electronic environment. An organizational flowchart provides visual reference to each of the many components in a given application. It illustrates how each component functions within an application and explains its purpose and location in relation to the whole. (Appendix 3 & 8.1)

I looked to R. Remington, M. Collien, & C. Plummer for expertise in the area of flowchart development. It was my intention that the flowchart would eventually become the layout of the application, so great efforts were put forth by the entire committee in designing an effective structure. The process began in October, 1991 and wasn't fully complete until the middle of February, 1992. (Appendix 3) Input from the committee focused on relating the Design Planner application to a broader project planning and management process, developing a dynamic organizational hierarchy within the flowchart, and in integrating each component of a successful project proposal. (Appendix 8.1) As the application evolved it became apparent that it was very important that the application begin simply and gain in complexity based on prior steps. It was also crucial that the process be cyclical and allow for continual refinement of the proposal. A final solution for the flowchart was applied in the introduction of the interactive application and functioned as an illustration of the interrelationship of the components. The chart also functioned as a navigational tool through the use of scripting buttons on each of the illustrated components. The buttons allow users complete navigational freedom within the application, making it a highly interactive interface.

In addition to designing an organizational structure for the informational contents of the application, the preliminary developmental stages also focused on establishing the visual layout, applying the identity mark and system, determining the necessary navigational tools, and how each component of the flowchart would be developed in relation to the whole through the use of HyperCard. I chose to create eight Hypercard stacks that would work together to become Design Planner. (Appendix 8)

Five of the eight stacks would form the body of the application and accordingly house the majority of the textual information. These were designated as areas where the user actually wrote his/her own project proposals through a series of ordered steps. The five main stacks are: Mission Statement, Goals, Objectives, Indicators of Success, and Processes and Strategies of Implementation. (Appendix 8.2-8) The three remaining stacks would each perform a specific function. One was to be a 'teaser' that would repeat a short brick layering
animation sequence to attract user interest. The second was to house the introductory text for the actual application, including instructions for use and animated sequences to demonstrate the relationship of Design Planner to the broader context of project planning and management activities, and to illustrate the dynamic developmental process utilized by the application. (Appendix 8.1) The last stack, the 'Print' stack, was to be the area in which users could view their proposal with all of its components in place. (Appendix 8.7) In this stack users are afforded several options. They can print a copy of the completed proposal, save a copy for later reference, (as a HyperCard stack, or for use in a word-processing application), add specific titling information for the proposal, or return to the body of the application to make further refinements.

The next issue I addressed was the visual interface. After experimentation and refinement, I chose to apply the identity mark in the upper left corner of each card. The visual field was then divided into four categories. A thin margin (25% of the screen width) below the identity mark was reserved for the vertical height of the screen for supplemental text, instructions, reminders, helpful hints, etc. The main portion of the screen was then dedicated to main body copy and for fields in which users would enter data. This area is separated from the 'help' area to its left by a vertical rule unified with the mark by a connecting horizontal rule. Directly below the main card text area, running along the bottom of each card are the navigational buttons that allow users to move freely between each of the five major components within the application. This greatly enhances the dynamic process stressed by the application. The lower left corner of the Macintosh screen, below the supplemental text area, always contains the main navigational buttons. Buttons deemed necessary allow the user to step forward, step backward, return to the previous card viewed, return to the navigator map, quit the application, edit textual information within each major category, print copies of cards and fields, print copies of a completed project proposal, and save a copy of the proposal in HyperCard or for use in a word processing program. (Appendices 8-8.7)
Application Refinement

Upon completing the developmental stages of the interface, its organization and functionality, I began to transform each section of the organizational chart from a concept to a functioning HyperCard stack. This process involved many steps. Initial priorities included input of the textual information and the production of the opening animated sequences. (Appendix 8.1)

The animation sequences in the introductory portion of Design Planner were included to illustrate and provide reference to a total systems plan utilized by Dr. Plummer to divide and relate the different steps in the project planning, evaluation, and management processes. The purpose for including the sequences was to show a user the broader context of which the application is a part, and to demonstrate how each stage in the evolutionary process used by the application fulfills a necessary requirement in a successful proposal. The pre-established total systems plan developed by Dr. Plummer was adapted to the Design Planner application and modified to suit the needs of a creative planning tool. The diagram was then termed "The Creative Planning Process" diagram.

A second animated sequence included in the introduction explains "The Design Planner Process" and follows the "Creative Planning Process" diagram. Through the order in which the diagrams are presented, users are introduced to the broader context of project planning and management activities, and then provided with a description of the process they will soon begin, and its relation to the broader picture. The design planner process is a representation of the way in which each component of a project proposal supports the others to form a whole. It also provides reference to the evolution of a proposal through its various stages. The brick metaphor is applied in this sequence to demonstrate how the application allows the user to build a proposal. (Appendix 8.1)

The text included in the application is designed to function as a learning device by providing users with the necessary information to gain an understanding of each step in the process, but also provides helpful hints, summaries, and examples. It is the result of a synthesis of information derived from many different fields of study. My research included design evaluation, process, and methodology, project planning, management and evaluation activities, goal setting, writing of objectives, and human interface design. After the data was actually entered in text fields in each of the appropriate stacks, I began to make refinements to the narrative. The text was revised and edited four times with input on content and proofreading assistance from R. Remington and D. Beardslee. (Appendix 7) During the refinement of the text content, a multi-level writing system using typographic variables such as size, posture, weight, etc. was implemented to form a hierarchy within the information. This approach was adopted to prioritize the content of the text and emphasize key
points, while downplaying issues of lesser importance. Studies in perceptual psychology have shown that this method facilitates an effective transferral of both content and emphasis by providing visual clues for the reader as to what is the most important information, what is secondary, etc.

As the refinement continued, it became apparent that some alterations in the interface structure and layout would be necessary. In order to provide feedback for users in regard to their location within the application, a visual coding system was applied to buttons and fields. Depending upon which component of the application the user was in (goals, mission, etc.) the button for that particular section was reversed so that the button appeared black with white type. This helps to eliminate any confusion on the user's part with regard to his/her location within the application. The use of reversed type as a coding device was also applied to 'active' cards. The cards on which the user needs to enter his/her own project specific information are considered active because they call for user action. Other cards that provide information are considered passive since the user is only reading and not physically performing. The title at the top of each active card is also reversed as mentioned previously as are the field headings, and all supplemental buttons, example, print notes, etc. The coding system on active cards provides a visual clue to users that they are to perform a specific action on that particular card before moving on. (Appendix 8-8.7)

Other changes made at this stage of revision included minor changes in the selection of typefaces and the addition of new buttons on certain cards of Design Planner. Modifications in type styles cleared up problems of legibility on the Macintosh screen. Buttons allowing the user the options of printing an entire card, or a specific field, a worksheet, or to see an example were added on the active cards within each of the five major components. Lastly, buttons were added to allow the user the option of saving his/her proposal as a HyperCard stack or as a text file that can later be accessed through any standard word-processing application (Macintosh, or DOS).
Thesis Exhibition

I chose to exhibit the Design Planner® application in the first of three theses shows in the spring of 1992. The show was scheduled from March 9-26, with the opening reception scheduled for Friday, March 13, from 7 to 9 pm.

I realized well in advance of the show date that the management of the Bevier Gallery would only allow me to have a Macintosh workstation in the gallery for one night, the formal opening on March 13. This forced me to complete the interface by the 13th for exhibition, and also left ample time for revision of the project following the exhibition prior to graduation. It was apparent that there would not be sufficient time prior to the opening to develop a user's manual for the exhibition, so I elected to design two posters to accompany the workstation and remain on display throughout the period of the exhibit. The posters contained a printed visual display of the identity system which included descriptive text about the application's purpose and benefits and provided insight into the future of interactive media applications in a general context. (Appendix 9)
User Manual Development

The user manual evolved out of the fully refined application. Its purpose is to provide written support for users to reference when using Design Planner. It is a complementary resource to the application.

The layout of the user manual is based on the same organizational method developed for the computer based application. Spatial relationships between items in the printed user manual and the on-screen interface are similar and provide unity throughout the identity system. The identity mark is applied throughout the manual, and the treatment of typography and graphics is similar to the screen treatments in the application. The process of developing the manual involved all members of the committee and considerable refinement. (Appendix 10)

The user manual contains two major categories of information: 1) an introduction and 2) a specific description including visual examples of each major component within the application. (Appendix 11) The introduction includes information concerning the necessary software needed to run Design Planner, as well as release information. Basic instruction is provided for users not familiar with the HyperCard environment. A statement concerning the purpose, benefits, context, and philosophy of the application is also included. Additional reference is provided in the form of a bibliography and credits near the end of the manual.

Specific instructions are included to demonstrate how a user will receive maximum benefits through use of the application. An introduction to the functionality of buttons, cards, and fields used in the interface prefaxes a detailing of each component in the application. Detailed information is provided in six subdivisions: Mission Statement, Goals, Objectives, Indicators of Success, Processes and Strategies of Implementation, and Print. Each area provides the user with examples and instruction in order to properly utilize the application's capabilities.
Evaluation Procedures

Design Planner® was evaluated on several levels and at different phases of development. Formative evaluation continued throughout the process through meetings with D. Beardslee and R. Remington. This method helped to monitor progress during the process and also to keep the aforementioned aware of possible problematic areas. Included in the formative evaluation procedures were periodic meetings with M. Collien and Dr. Plummer, each adding helpful suggestions with regard to their particular areas of specialty. In addition to the individualized meetings just mentioned, the full committee met twice during the development of the application to discuss progress, pitfalls, and the visual interface itself. Also used as an evaluation tool throughout the process was my Thesis Project Timeline (Appendix 4). The timeline was very helpful in scheduling, prioritizing, and monitoring progress.

Summative evaluation techniques included meetings with individual committee members, user testing, and evaluating the finished application and supporting materials with the original goals and objectives set forth in the Thesis Proposal. (Appendix 2) During meetings with committee members the Thesis Project as a whole was discussed in terms of its success, its relative stage of completion, and the role the Design Planner at RIT after my graduation. The project as a whole is successful at meeting the goal and objective requirements articulated in the Thesis Proposal. I have come to realize that the computer application itself is in a prototype stage and in need of continued refinement and testing. However it is successful in that it does function and can be utilized by a user to develop a project proposal. Design Planner will be used by both undergraduate and graduate students through the Graphic Design Department and the Media Resource Center to develop thorough project planning documents.

User testing included demonstrations with students from a variety of backgrounds: Computer Science, Computer Graphics Design, Graphic Design, Glass, Interactive Media Design, Metals, and Simulation System Experts. The purpose of demonstrating the application to students with such a diverse range of specialization was to ensure that the interface did, in fact, assist users in developing a project plan and was understandable and effective to both experts in the field as well as those with relatively little computer experience. Feedback from each of the students tested was then implemented in order to facilitate a more effective final product.

Student response was generally very positive. Those tested and others I spoke with about the application were genuinely excited about the functionality of the application, as well as the theoretical concept underlying the project. Many students quickly recognized how they could use and benefit from Design Planner in their own creative process. Most expressed an eagerness to utilize the application as a tool to articulate upcoming project proposals ranging from planning a Graduate Thesis to applying for a Fellowship, or developing a proposal for a publicly funded sculpture competition.
Conclusion

I feel that Design Planner® is highly successful in terms of my original goals and objectives. There is no question as to whether or not the idea was worthy of a Graduate Thesis project. The prototype application is the first of its kind. The idea of design evaluation translated to an effective problem solving tool is innovative, and the media with which the message is delivered is still in its developmental stages and will play a major role in the transferral of information in the future. Interactive media design is only beginning to be truly understood and applied in many fields. At the time of this writing, articles are being written about how crucial effective design planning can be to a business. Also being mentioned frequently in both scholarly and professional circles is the fact that designers need to be more able to articulate and adapt their process in such a way that it is justifiable to industry. Design Planner will satisfy both of the aforementioned needs with the aid of a new technology. The project was truly unique in both concept and media.

The development of my thesis project was an exciting experience and will relate directly to my interests in professional practice. (Effective design is essential, in my opinion, but without a means of articulating how and why, a client will benefit from quality design a designer's role is devalued.) I have learned a great deal through my study of graphic design history. The most important lesson I learned is that a designer needs to be a 'Renaissance Person' in the sense that he/she must be able to analyze, synthesize, and apply input from a wide variety of disciplines in his/her work. The designer must be able to interact and articulate his/her skills in relation to industry, must also be a communicator with a strong command of any and all media at his/her disposal, must be selective in choosing the most effective means of delivering a message, be aware of the consequences of the message sent, and be prepared to measure the success of the work in order to validate its necessity.

As I begin to look back on the thesis project, I'm continually excited by what I was able to accomplish with the assistance of my committee, a truly innovative and inspiring project, one that could never have been realized in professional practice due to the lack of time and resources. This is in perfect accord with my view of a graduate level education. I hoped that my Thesis project would result in a product that would be truly unique and powerful, an idea brought to fruition through an interdisciplinary approach to learning, one that is a synthesis of many inputs resulting in a new and exciting product, a project that challenges existing theories with a new and perhaps more appropriate thesis, a body of work that re-examines the process of what the field is all about, what it could be about, and what it is. I believe it is the duty of a graduate student to provide new insight into his/her respective field, for the profession hasn't time to deal with such scholarly endeavors, and others simply aren't qualified.
Glossary

Aesthetics - of or relating to the beauty in art or nature.
Analysis - the separation of a whole into its parts or elements, opposite to synthesis
Appropriateness - suitable for or belonging to the person, or circumstance.
Articulate - to express in words, also; arranged with coherence, interrelated.
Communicate - to transmit or exchange thought or knowledge.
Computer Application - a tool designed to perform a specific task through the use of a computer.
Conceptual - that which is conceived or devised mentally: a concept, idea, plan or design.
Conditions - an event, or fact, necessary to the occurrence of another.
Criterion - a standard or rule by which a judgment can be made, a test.
Disseminate - to scatter, diffuse far and wide.
Design (process) - a step-by-step process of research, planning, and execution by which a creative solution is arrived at.
Design (evaluation) - a process that measures the relative success of a creative product in terms of the communication needs that facilitated the project to begin with, and the overall aesthetic qualities of the work.
Dynamic - producing or involving change or action.
Effective - producing the proper result, efficient.
Evaluate - to find or determine the amount, worth, value, to appraise.
Explicit - plainly expressed, clear, developed in detail, not implied.
Formative Evaluation - evaluation at the intermediate stages of a project.
Goal - something toward which effort is directed; an end or an objective.
Hierarchy - a group arranged in successive orders or classes, each of which is subject to or dependent on the one above it.
HyperCard - authoring software for the Macintosh platform by Apple®.
bubble - screen objects that allow for user navigation.
field - on screen containers for text.
cards - equivalent to a new 'page' in a linear format.
stacks - equivalent to a new book in a linear format.
Hypermedia - a non-linear method of information transferral.
Implicit - implied or understood, but not specifically expressed.
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interactive Media</td>
<td>a technology that allows the user to make specific choices about how and in what order he/she wishes to access the information.</td>
</tr>
<tr>
<td>Interface</td>
<td>a liaison between two or more persons, objects, tools.</td>
</tr>
<tr>
<td>Invoke</td>
<td>to call upon, appeal to, or summon the assistance of.</td>
</tr>
<tr>
<td>Legible</td>
<td>readily perceived or discovered from apparent signs or evidence, capable of being read or deciphered.</td>
</tr>
<tr>
<td>Linear</td>
<td>extension in one dimension only, pertaining to length.</td>
</tr>
<tr>
<td>Metaphor</td>
<td>a figure of speech in which one object is likened to another by speaking of it as if it were that other.</td>
</tr>
<tr>
<td>Mission Statement</td>
<td>a broad statement of intent with regard to a task.</td>
</tr>
<tr>
<td>Multi-level writing</td>
<td>a system in which typographic variables are used to prioritize and emphasize appropriate words, phrases, or locations.</td>
</tr>
<tr>
<td>Multimedia</td>
<td>drawing from more than one medium, ie: sound, video, animation, drawing, etc.</td>
</tr>
<tr>
<td>Objective</td>
<td>that which is striven for or aimed at.</td>
</tr>
<tr>
<td>Organizational</td>
<td></td>
</tr>
<tr>
<td>Flowchart</td>
<td>a diagram used to visualize the many parts of a computer application.</td>
</tr>
<tr>
<td>Performance</td>
<td>an act, deed, or accomplishment, a manner of operating or functioning.</td>
</tr>
<tr>
<td>Prioritize</td>
<td>to establish a hierarchy from most to least important.</td>
</tr>
<tr>
<td>Process</td>
<td>a course or method of operations in the production of something.</td>
</tr>
<tr>
<td>Project Proposal</td>
<td>a document describing: a problem, the methods by which it will be solved, by whom, when, where, why, and how; also including relevant deadlines, and any budgetary concerns.</td>
</tr>
<tr>
<td>Success</td>
<td>a favorable or desired outcome of something attempted.</td>
</tr>
<tr>
<td>Success Indicator</td>
<td>that which will point to the successful completion of a goal or objective.</td>
</tr>
<tr>
<td>Summative Evaluation</td>
<td>terminal evaluation concerned with the comparative worth or effectiveness.</td>
</tr>
<tr>
<td>Synthesis</td>
<td>the assembling of separate or subordinate parts into a whole, opposed to analysis.</td>
</tr>
<tr>
<td>System</td>
<td>orderly combination or arrangement of parts, elements, etc., into a whole; especially such combination according to some rational principle, also a synonym for computer.</td>
</tr>
<tr>
<td>Template</td>
<td>a pattern or gauge used in shaping or building something.</td>
</tr>
<tr>
<td><strong>Visual Coding</strong></td>
<td>a system in which certain elements are assigned specific attributes for the purpose of separating them from others.</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Visual Interface</strong></td>
<td>pertaining to computer applications; referring to the aesthetic qualities of the screen layout, including transitions, animation, and the functionality of tools provided.</td>
</tr>
</tbody>
</table>
Bibliography


Romiszowski, Dr. A. J. *The Selection and Use of Instructional Media, For Improved Classroom Teaching and for Interactive, Individualized Instruction.* Great Britain: Kogan Page LTD. 1988.


Appendix 1

Preliminary Thesis Proposal
Thesis Proposal for the Master of Fine Arts Degree

College of Fine and applied Arts
Rochester Institute of Technology

Submitted by: Roy J. Prochaska Jr. Date: 9.20.91

Thesis Committee:
Chief Advisor: R. Roger Remington
Associate Advisors: 1.) Dr. Charles Plummer
                     2.) Mr. Mark Collien

Departmental Approval:
(signature of graduate faculty member) Date: 9.20.91

Approval, Special Assistant
to the Dean of Graduate Affairs:
(signature of Special Assistant to the Dean) Date: 9.20.91

Computer needs other than word processing:

Yes [x] No [ ]

I will need a Macintosh computer with a hard drive, software packages including Hypercard, Macromind Director, Adobe Illustrator, Quark XPress, and a laser disc player, a video digitizer, a color Macintosh monitor, an NTSC Monitor, possibly a sound recorder, and the ability to use all of the above for the opening of my given Thesis exhibit.
Title: Design Evaluation Tool

I propose to develop an interactive media program about design evaluation, and an identity system to represent the aforementioned for my MFA Thesis project. The project outcomes will be a computer based interactive media program with a project identity and manual.
Appendix 2

Thesis Proposal
Thesis Project Proposal
Roy Prochaska Jr.
Version 7.0, 11.13.91

1. Project Title: Design Evaluator

2. Client: Rochester Institute of Technology, Department of Graphic Design
One Lomb Memorial Drive, PO Box 9887, Rochester NY 14623

428 Clay Road (A), Rochester NY, 14623.
8730 Nashville, Oak Lawn IL, 60453.

4. Problem
Statement: In the context of the profession of graphic design there is no tool
designers and others can utilize that will help clarify and define a
problem, and outline a process that will effectively solve the
problem.

Audience: Professional graphic designers, design educators, design
students, and clients of the aforementioned.
5. Documentation

of Need, Situation Analysis:

In order for designers to be able to evaluate, judge, and produce design based on common standards there must be a system that will enable designers, educators, professionals, clients and students alike to discuss design in terms of its true effectiveness, rather than elaborate on the opinions of others. This system should approach 'design' as a process of determining what the real problem is, setting goals for an effective solution, and determining objectives that must be met. Such a system will benefit the: A). Designer; by defining a problem clearly, thus allowing for focus, and a ‘guideline’ of how to go about solving the problem at hand. B). Profession; by defining the process of design explicitly, allowing for discussion, dissemination, criticism and evaluation based on sound criteria. C). Society; by facilitating more efficient, and effective communications.

6. Goals:

6.1 Provide a standardized format by which design can be evaluated, explained, critiqued, judged, discussed, and disseminated.
6.2 Provide the user with a friendly, and highly interactive interface.
6.3 Provide a user manual complete with a project identity for the user.
6.4 Provide a template structure that can be applied to a wide variety
of design problems and will convert the design problem to a process to follow in order to produce an effective solution.

6.5 Help the user define explicitly what is to be achieved with a given product.

6.6 Allow for a broad to narrow, or fuzzy to clear operational process.

6.7 Utilize an appropriate metaphor (onion, coach, parent, government, conscious)

6.8 Allow for flexibility.

6.9 Ensure that the designer has considered appropriate cultural, societal, technological, environmental, and economic issues.

6.10 Define objectives in behavioral terms. (Tylerian model)

6.11 Present evaluation information to the designer in an easily usable, effective, and non-misleading or confusing manner. (Alkin)

6.12 Provide the user with both Formative and Summative objectives. (Scriven)

7. Objectives:

The ‘Evaluator’ tool will enable the user to:

7.1 write goals and objectives for a given design task.

7.2 print out a listing of objectives and goals for a given design task.

7.3 identify a product's effectiveness in relation to the project goals.

7.5 Apply the ten general principles of Human Interface Design as found in Apple's™ Hypercard Stack Design Guidelines; (listed below)
7.5a The use of a clear metaphor with appropriate visual and audio effects can allow users to work with a set of existing expectations and apply those to the new situation.

7.5b Users need to be able to directly manipulate their environment, and they need visual and audio feedback.

7.6 Write criteria in assessable terms.

7.5c It is much easier to “see-and-point” as opposed to remember and type.

7.5d There needs to be consistency within the following:
   * the graphic look
   * the arrangement and grouping of buttons
   * visual and audio feedback
   * card layout
   * background for cards with similar functions
   * the stack structure

7.5e The WYSIWYG or (What you see is what you get) structure

The layout of the stack should not be a puzzle to the user.

7.5f The user must have control of the actions, not the computer. The computer does the work, but the user must be the director of it.

7.5g Appropriate feedback and dialog allow the user to know what is going on, if a choice is inappropriate at a given time, etc.

Feedback can allow the user to learn from his/her mistakes.

7.5h Because users generally make mistakes, forgiveness for them must be built into the program.
7.5i A perceived stability allows the user to feel more comfortable and more in control than a program that seems to change at random.

7.5j Aesthetic integrity will enhance the effectiveness of the program.

8. Processes

Strategies:

* Investigate and learn interactive media programs including Hypercard, and M.M. Director.

* Research is to include the purpose of evaluation, its benefits, and shortcomings. Evaluation methodologies, and their applications are also to be investigated.

* After the analysis of many evaluation methods I will synthesize the best and most appropriate methods and formulate an evaluative system designed to meet the projects needs.

* Seek out individuals in professional practice and visiting guests and lecturers that may be able to offer valuable input.

* Demonstrate the 'Evaluator' to student users in order to evaluate progress and effectiveness.

* Focus on the design process, and blending function with aesthetics. (inherently will allow for flexibility)

* The module should begin simply, gain in complexity and detail, and then return back to the beginning of the query process with completed lists of criteria, objectives, goals, constraints, etc.

Dynamic Process.
Utilize a simple and conceptual metaphorical structure.

9. Timeline:

Under separate cover.

10. Pragmatics:

- The project must be presented at the first Thesis Exhibition on March 13, 1992.
- At the time of the given Thesis exhibition the application will need to be functional, and in the Bevier Gallery. This will obviously require the use of a Macintosh computer with a color monitor, and possibly a videodisc player and other hardware.
- The documentation of the process, or 'the book' will be signed by the Thesis Committee, the appropriate Dean's, and be fully certified by May 23, 1992.

11. Dissemination:

The projects outcomes will be disseminated through the programs accessibility in the Media Resource Center at Rochester Institute of Technology, and also through the use of RIT faculty and students. Efforts will also be made to gain exposure for the module through the American Center for Design, and the American Institute of Graphic Arts.
12. Evaluation:

The projects outcomes will be measured against the above mentioned goals and objectives by myself and the Thesis Committee, progress will be monitored throughout the process. The project will also be demonstrated to and then used by students at RIT, and evaluated by students from various departments including design, interactive media, and computer graphic design, and systems analysis.

13. Bibliography:

Underway under separate cover.

14. Glossary:

Underway under separate cover.
Appendix 3

Flowchart Development
**A notetaking device will also be available at all times.**
WRITE OBJECTIVES

Introduction to writing objectives

Purpose and benefits of objectives

Qualities of useful objectives

Importance of well defined objectives

Megers Methods

Performance

Examples

Conditions

Examples

Criterion

Examples

WRITE OBJECTIVES

Keyword listing appears on split-screen
**A notetaking device will also be available at all times.**
A note-taking device will also be available at all times.

The introduction card will provide information about the process of moving through the stack for a first time user, and also ensure that the user starts at the correct point.

An experienced user will have the option to go directly to a certain area without following the informational hierarchy. Each rectangle in the chart above will also function as a button.
**A notetaking device will also be available at all times.**

**The introduction card will provide information about the process of moving through the stack for a first time user, and also ensure the user starts at the correct point.**

**A n experience3d user will have the option to go directly to a certain area without following the informational hierarchy. Each rectangle in the chart above will also function as a button.**
** A notetaking device will also be available at all times.

** The introduction card will provide Information about the process of moving through the stack for a first time user, and also ensure the user starts at the correct point.

** An experience3d user will have the option to go directly to a certain area without following the Informational hierarchy. Each rectangle in the chart above will also function as a button.
Develop a 'Design Evaluation Plan'

<table>
<thead>
<tr>
<th>Purpose</th>
<th>What to expect, Outcomes</th>
<th>Navigator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide a Notetaking device</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**INTRODUCTION**

<table>
<thead>
<tr>
<th>Client/Designer Meeting</th>
<th>Assess Needs</th>
<th>Set Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify Design Criteria</td>
<td>Mission Statement</td>
<td></td>
</tr>
</tbody>
</table>

**DOCUMENTATION OF NEED / SITUATION ANALYSIS**

<table>
<thead>
<tr>
<th>Importance of Hierarchy</th>
<th>Help to clarify objectives</th>
<th>Provide a Utopian vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin to consider pragmatic issues</td>
<td>Enter pertinent data</td>
<td></td>
</tr>
</tbody>
</table>

**WRITE PROJECT GOALS**

<table>
<thead>
<tr>
<th>Introduction to writing objectives</th>
<th>Purpose &amp; benefits of objs</th>
<th>Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Qualities of useful objs</td>
<td>Conditions</td>
</tr>
<tr>
<td></td>
<td>Importance of well defined objs</td>
<td>Criterion</td>
</tr>
</tbody>
</table>

**WRITE PROJECTS OBJECTIVES / MAGERS METHODS AS MODEL**

<table>
<thead>
<tr>
<th>Develop a project timeline</th>
<th>Appropriateess</th>
<th>Answer progress query</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop a project budget</td>
<td>Frascara considerations</td>
<td>Review, Refine, Revise</td>
</tr>
<tr>
<td>Consider prod/dist options</td>
<td>Frascara considerations</td>
<td>Implement process plan</td>
</tr>
</tbody>
</table>

**PROCESSES AND STRATEGIES**
FILL IN VERSION
OF CHAIN

GOALS 4.1

OBJECTIVES 5.3

INTRODUCTION TO OBJECTIVES

INITIAL STATE OF OBJECTIVES

WHAT IS USUAL OBJECTIVES

WRITING PROJECT GOALS 4.3

SAMPLE GOALS 4.2

WRITE PROJECT OBJECTIVES 5.3

PERFORMANCE

CONDITIONS

APPROPRIATE

INPUTS

6.4

6.5

US

4.3

4.5
Cultural Concerns

- Appropriateness for the target audience 3.32
- Sends a positive message to the target culture 3.33
- Understanding of sensitivities and ethnicity 3.33

Awareness to societal issues

- Crime Prevention 3.411
- Injury Prevention 3.412
- Discrimination 3.413
- Literacy 3.414
- Health 3.415
- Public Safety 3.416
- Education 3.417
- The Environment 3.418

Resource Usage

- Economic Resources 3.511
- Naval Resources 3.512
- Human Resources 3.513
- Technological Resources 3.514
- Environmental Resources
  - Waste minimized 3.612
  - Exploration of options 3.613

The Design Conscious

Introduction, Explanation

The Design Conscious Chart

INCLUDE pg 3 from frontline
G.D. Findlay
Send some sound
"This is football"
Roy J. Prochaska Jr.
Thesis FlowChart
Design Planner
Version 8.1
1/14/92

* Chart under separate cover

**Teaser Screen**

**Introduction**
Purpose of the application.
What to expect, anticipated outcomes.
Bibliography?

**Total Systems Plan Diagram**
A visual example of the steps involved in the entire project

**Design Planner Navigator**

**Notetaking Device**

**Mission Statement**

**Goals**

**Objectives**

**Indicators of Success**

**Processes and Strategies**

**Client Meeting**
Accept, analyze and define problem

**Asses needs**

**Determine Priorities**

**Specify design criteria**

**Write a project Mission Statement**

**Design Conscious**

**Introduction to writing goals**

**Explain the importance of hierarchy**

**Provide for a Utopian vision**

**Demonstrate the usefulness of goals in writing objectives**

**Begin to consider pragmatic issues**

**Write project Goals**

**Introduction to writing objectives**

**Example method**

**Performance**

**Conditions**

**Criteria**

**Write project Objectives**

**List indicators for each objective**

**Indicators for objective one**

**Indicators for objective two**

**Indicators for objective three**

**Indicators for objective four**

**Print Design Plan Proposal**

*One set of indicators per objective*
Total Systems Plan Diagram

1. Define Needs and Plan Evaluation Strategies
2. Develop and Apply Policies and Standards
3. Assess Needs
4. Manage

Implement the Planned Design Process

Produce and Disseminate

Evaluate and Make Decisions

Version 1.4
Entire Systems Diagram
Thesis Flowchart
Roy L. Pachua Jr.
TOOLS FOR PROJECT DEVELOPMENT

A Picture of a Project.

This diagram's flow follows the logical steps of project design/operation.

Click here!

PICTURE OF A PROJECT

Manage the Project

Design the Project

Implement the Project

Evaluate & use info. in Decision Making

Follow up on Project

Assess Needs

Design

Conduct Activity 1

Conduct Activity 2

Conduct Activity 3

Operate the Project

1.0

2.0

5.0

4.0

Click to return to the previous card.
DESIGN EVALUATION

METAPHOR LISTING

D.E. IS LIKE A:

- Whole is stronger than the sum of its parts
- Each part supported by the others
- Part of a whole - 2% of 100% - obvious if something is missing
- Interrelated - many similar pieces - all pieces necessary - weak if not complete
- Develop goals - projects - review
- Goal, objectives - budgeting - R&D
- Resource allocation - analysis - monitor progress

RIGHT/WRONG - RULES - PUNISHMENT
- Government - authority - punishment - order
- Parents - role model - morality - beliefs
- Do the right thing

BUILDING TOOLS - PART - VERTICAL - STAKING - LAYING
- One category of pieces - necessary - parts alone do not function (nothing)
- Multiplicity of each category necessary - all parts together are successful
- Many parts - prototype - analysis - evaluate - revisions - change

SOMETHING TO BUILD - STRENGTH - AT A TIME
- Underlying support - develop - sense of step by step process - DRI/PMT - hierarchy
# Representational Matrix

<table>
<thead>
<tr>
<th><strong>Signifiers</strong></th>
<th><strong>Iconic (Looks Like)</strong></th>
<th><strong>Indexic (Points To)</strong></th>
<th><strong>Symbolic (Convention)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Signified</strong></td>
<td>Design</td>
<td>Evaluation</td>
<td>Critique</td>
</tr>
<tr>
<td></td>
<td>PRINT RECORD</td>
<td>STATISTICAL ANALYSIS</td>
<td>Roundtable DISCUSSION</td>
</tr>
<tr>
<td></td>
<td>TRANSACTION DOCUMENTS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SIGNS/INSTRUMENTS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>STRUCTURE</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>LAYOUT</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PLAN</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>COMPUTER</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CREATIVE</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>AUDIENCE USER</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SCIENTIFIC METHOD</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>GROUP interview</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CONSIDERATION</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FINAL DECISIONS</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>TISSUE</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ABSORBENCY</td>
<td>GOOD/POOR</td>
<td></td>
</tr>
<tr>
<td></td>
<td>AMBIGUOUS</td>
<td>SUBJECTIVE / OBJECTIVE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>THEORICAL / HYPOTHESIS</td>
<td>POSITIVE / NEGATIVE</td>
<td></td>
</tr>
<tr>
<td></td>
<td>IMPOSSIBLE SUCCESS</td>
<td>ATTENTIVE / OBSERVANT</td>
<td></td>
</tr>
</tbody>
</table>
## Representational Matrix

<table>
<thead>
<tr>
<th>Signifiers</th>
<th>Foundation</th>
<th>Subdivision</th>
<th>Analyze</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iconic</td>
<td>A building foundation</td>
<td>Bricks Girders Blocks</td>
<td>Math formulas equations thought/thinking</td>
</tr>
<tr>
<td></td>
<td>Bricks</td>
<td>Cement</td>
<td>Perplexed facial expressions close inspection</td>
</tr>
<tr>
<td>Indexic</td>
<td>Construction equipment/workers concrete slabs</td>
<td>Condo complex apartment blocks</td>
<td>Mathematical equations theoretical constructs</td>
</tr>
<tr>
<td>Symbolic</td>
<td>Bricks Girders Cement truck</td>
<td>Blueprint Tech. drawings division split</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cement</td>
<td>Strength/muscle</td>
<td></td>
</tr>
</tbody>
</table>
Roy Prochaska Jr.
1/11/92
Thesis identity mark development strategy

1.0 Analysis

1.1 Orientation
1.2 Develop keyword listing
1.3 Verbal interpretent matrix
1.4 Visual interpretent matrix
1.5 Appropriateness Analysis with "Trademark Field", B. Swinehart

2.0 Synthesis

2.2 Develop a strategy for image creation

DEVELOPMENT STRATEGY:

Target mark categories from T.F.
A. Icon, (abstract, representational)
B. Composite Letterform, and representational
C. High Discrimination Wordform

2.3 Develop sketches (marks first, then typography)
2.4 Examine possible merging of several ideas
2.5 Choose a mark to fit one of the above categories
2.6 Refinement
2.7 Implementation
Appendix 6
Final Identity Marks
Design

Planner
Design Planner
Design

Planner
Direction Design and Associate Planner
Appendix 7
Text Development and Revision
Welcome to the Design Planner, an interactive planning guide for the process of design. This application was created using Apple's software, Hypercard 2.0. After reading the remainder of the introduction, click the forward arrow to view a sequence designed to provide further insight into the Design Planner, its mission and purpose and how it can help you.

This application will help you to formulate and articulate your design process in a problem solving approach through a series of steps. After using the Design Planner you can expect to have written a project proposal that will include: a project mission statement, goals, objectives, indicators of success, and processes and strategies. After completing the introduction segment you will arrive at a map illustrating how each of the many components in this application are related. The map will function as the main navigational tool. At any time you may refer back to the map to select your own path through the information by clicking on a button. Upon completion of your proposal you may save it for later reference, and print a copy for your own personal use, or for a client.

The main navigational buttons appear at the bottom left of the screen, and are represented in the form of 'bricks'. Click on a brick to activate its functionality, described below.

*MAP* - will bring you to the map, and allow you to navigate throughout the stack.

*BACKWARD ARROW* - will allow you to move backward to the card preceding the one you are currently on.

*FORWARD ARROW* will allow you to move forward to the next card.

*QUIT* - allows you to quickly exit the application.

*LAST* - allows you to return to the card from which you came.

On certain cards the button in the lower right of the navigational area will vary between the following commands:

*EDIT* - will take you directly to the card where you enter text (within each area) ex: click "edit" when in the "Objectives" stack to go to the "Write Objectives" card. This button is most useful when re-entering the application to make changes to your proposal.

*REVIEW* will allow you to go to the first card of the stack you are in. ex: click the "Review" button when working in the "Mission Statement" stack to review the introduction to the process of developing a mission.

*PRINT* the print button will allow you to print a copy of your document, or save a copy for later use.

Upon entering the main portion of the application you will notice a new group of buttons appear directly...
Problem Statement:
In the context of the profession of graphic design there is no tool currently available that will enable a designer to clarify and define a problem, and articulate a process that will produce an effective solution to the problem.

The Design Planner was developed to improve the quality of graphic communications. The thesis I present is this: "Graphic messages are often misunderstood, or inappropriate due to a designers' negligence in understanding the communication objectives of the problem."

In developing this application I hope to contribute to the profession of visual communication by providing a tool that will enable users to produce a document stating explicitly what they intend to accomplish through a project. By following the process outlined in this application the designer will be continually reminded of their goals and objectives as they design, helping to produce an effective solution. Furthermore the Project Proposal the application will render is a powerful design planning and management device, for use in-house and in client interaction.

This interface will bring the entire proposal process to the user in a highly interactive format. Interactivity allows for the user to access information in ways never before possible. By allowing the user to navigate unbounded within the application the interface allows for great flexibility. The Design Planner can be used by a novice to understand the components of, and develop their own project proposal, or by an experienced user to access specific information or make revisions to an existing proposal.

If the application is utilized properly the ensuing project proposal will serve to:

--make the designer aware of issues that could influence the design product
--provide for the basis of dialogue with a client (helping to ensure both the designer and the client expect the same outcome, and are working to reach common objectives)
--allow for scheduling and monitoring of the design process, (ensuring the project meets its objectives on time, within the budget)
--allow for monitoring the design process in progress toward the accomplishment of objectives
--help to clarify the project in terms of true communication objectives
--ensure appropriate solutions are arrived at
--prioritize communication objectives, which translates into a clearly focused message
The project "Mission Statement" is to be articulated in very general terms. It is to be used as a forum in which to state in the broadest of terms what the project will attempt to accomplish. It is also the appropriate place to list generally all that might be accomplished above and beyond specific objectives.

The ideal "Mission Statement" will address the following issues:

**Who, What, When, Where, Why, and How.**

Who is the target audience?
- What will your project do?
- When will the project be complete?
- Where will the project be implemented?
- Why are you proposing the project?
- How are you going to accomplish the project?

The following may be useful things to consider before you articulate your "Mission Statement."

**Who** - Define any and all possible audiences or any other groups, individuals, or organizations that may have interest or benefit from your work, who will be involved in the project?

**What** - What is your project, what will it do, what won't it do, what do you think it might do, what do you wish it could do? Will the finished outcome be mass produced, or only one, one-of-a-kind?

**When** - When will the project be complete, when will it be in prototype stage, when would you like it to be complete?

**Where** - Where will it be: local, regional, national, global, public or private space, exclusive or general access, in several locations (distribution), or a central location.

**Why** - Why are you addressing this issue, what is the problem or situation you feel needs to be altered, what situation are you attempting to improve, why do you think your work is necessary, why is it important to address the issue now.

**How** - How are you going to solve the problem, what techniques, input, sources, technology, funding, etc., will you utilize, how will the finished product look.
In order to conduct yourself professionally from the very outset of a project there is a need for a preliminary meeting with the prospective client. Listed below are some of the many things that need to be considered during the initial meeting you should have with the client in defining the following:

During the initial meeting you should expect the client to define the project scope, budget, and relative scheduling (deadlines), as well as the existing pre-condition that needs to be augmented, or supplemented. In other words, what is the problem that needs to be fixed? The client provides other relevant inputs (audience, copy, etc.) if information is missing.

After the client has provided you with information concerning the project you should then consider the possibility of anything additional that you feel needs to be considered as well. Many times you as a designer are much more sensitive to the possible needs of your prospective client they may think of. Be sure to analyze the situation carefully and to ask any and all relevant questions before accepting a task.

The following Marketing/Communications Analysis was developed by Dr. Roger Remington and may provide you with some additional information if you are not satisfied with the client's initial input.

1. List the 10 words that to you best describe the nature or function of your organization.
2. From the words listed above, extract the five most important terms and list in priority.
3. What difference does it make that your organization exists?
4. As you understand it, what is the mission of your organization?
5. On a day-to-day basis, what specific ways do you see this mission becoming operationalized?
6. Forward thinking; list five words that might characterize the personality of your organization in ten years.
7. From your own perspective, please list the key audiences for your organization's public messages.
8. From the list above, please extract the most important and place below in a priority listing.
9. In terms of your personal point-of-view, how do you feel that your audience should perceive your organization. Simplify your answers to one or two words if possible.

The designer (creative manager) develops a schedule and fee estimate that the client deems satisfactory before work ever begins. (The Design Planner is a tool designed to assist in both client interaction and in internal prioritizing of a given task).
After the initial meeting, and once the project has been accepted, it then is the designer's duty to determine the project needs. Only you with the assistance of your creative team will be able to make critical choices about the projects' particular needs.

The following four categories of information should be considered in terms of your project: Designelry, Audience, Societal, and Resource Concerns. Think of the issues discussed in the aforementioned in terms of the impact they might have on your project. (Assess your project's needs relative to the constraints they could possible represent.)

For example: Is there a cultural barrier to be addressed, if so the failure to do so might translate into the alienation of a large portion of your target audience.

The following issues should be considered:

**Designelry Concerns:**
- Budget
- Client
- Color
- Computer-related work
- Contrast
- Copywriting
- Designer/firm
- Distribution
- Form
- Format
- Freelance Services
- Illustration
- Line
- Photography
- Presentation methods
- Processes and techniques:
  - Printing/production
  - Shape
  - Statistical analysis
- Texture
- Time
- Typography

**Audience, Societal, and Resource Concerns:**

**Considerations related to:**
- the Designer
- the Audience
- Society
- Resources

**RP**
Issues related to your intended audience need to be critically analyzed to ensure that your message is communicated in the most effective manner. This will eliminate the possibility of miscommunication, alienating, confusing, or offending a portion of the audience.

The following issues should be considered:

**Audience Concerns:**
- Appropriateness for the target audience.
- Sends a positive (desired) message to the target audience/culture.
- Sends a cohesive and understandable message.
- Exudes an understanding and sensitivity to issues related to ethnicity.
- Consider the possible impact of your message on the public.
- Avoid problems of performance related to visual perception.
- Consider the scope of your project: local, regional, national, or international.

<table>
<thead>
<tr>
<th>treat these 4 in parallel ways</th>
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<tr>
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Assess Needs: Audience Concerns

**Audience Concerns**

Issues related to your intended audience need to be critically analyzed to ensure that your message is communicated in the most effective manner. This will eliminate the possibility of miscommunication, alienation, confusion, or of offending a portion of the audience.

The following issues should be considered:

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- Exudes an understanding and sensitivity to issues related to ethnicity.
- Consider the possible impact of your message on the public.
- Avoid problems of performance related to visual perception.
As visual communicators we have the power to inform, influence, persuade, educate, and affect the general public with our messages. Our messages communicate on many levels: conscious, sub-conscious, un-conscious, literal, metaphorical, etc. The messages we send are also affected by the surrounding context, the medium, their timeliness, etc. As a result of the power we as communicators have, it is critical we are abreast of "Societal Concerns" that may affect the meaning or interpretation of our work.

The following are topics that should be considered:

Societal Concerns:
- Aids
- Animal rights
- Crime Prevention
- Discrimination
- Economy
- Education
- The Environment
- Global / International Issues
- Health
- Injury Prevention
- Literacy
- Political Climate
- Public Safety
- Solar power

See prior comments
As designers we initiate the use of vast amounts of paper and other substances that are products of irreplaceable natural resources. It is important that designers be aware of this fact, and that much of what we produce eventually will become garbage. Our potential to reduce waste or abuse natural resources is great. As a result we should be conscious of our options when related to the way in which we use resources.

The following issues areas of concern:

**Resource Concerns:**
- Economic resources - efficiency, productivity, quality
- Environmental resources - minimize waste, use of recycled papers, soy-based inks
- Natural resources - maximize materials used
- Human resources - quality, efficiency, most appropriate people to perform tasks
- Technological resources - apply technology when appropriate

Assess needs 2/20

Resource Concerns.

RP

this should be reconsidered in future as it is not to correlate well with listing.
After assessing the needs of both the client and the audience it is the designer's responsibility to prioritize those needs (through goals and objectives) in order to ensure successful communication outcomes. Although the actual process of prioritizing takes place when you develop your goals it is useful to consider the issue at this point.

You can begin to develop a hierarchy of eventual goals by prioritizing your projects' needs now. If you think of the design process as an exercise in problem solving you will begin to see the successful outcome of your project as the result of a systematic approach to solving the problem. In order to solve the problem you will design a product that meets each need of your communication objectives. Some needs will be critical, others will be superficial relative to a successful creative solution. Naturally you will address the broader, more important issues before those of lesser significance. You can ensure doing so by prioritizing your needs in a hierarchy, from most to least important. In doing so you will have developed a much clearer vision of how you are actually going to go about designing a successful product.
Write a project
Mission Statement

A Mission Statement is a very general, brief statement of intent. It should not exclude any possible outcome of the project, and be in the broadest of terms. Allowing for multiple interpretations is appropriate at this stage of the proposal. Through development of Goals, Objectives, Indicators of Success, and Processes and Strategies the proposal naturally evolves to provide a very concise accounting of all that the project will entail.

**Mission Statement**

<table>
<thead>
<tr>
<th>Mission</th>
<th>Goals</th>
<th>Objectives</th>
<th>Success</th>
<th>Processes &amp; Strategies</th>
</tr>
</thead>
</table>

- A/The __________ that will __________ to this end

Help: What could be included here as a parallel to "Action Verbs" in Objectives?
Objectives are a function of Goals. A Goal Statement describes a desired state, and the supporting objective explains specifically what will be necessary for that state to be achieved, and how to know when the Goal has been achieved. Therefore it is necessary to develop Objectives that will accomplish the intent of each Goal.

Think of this metaphorical example:

- A Goal is a house, and the objectives are the bricks that when assembled form the house. When designing the house an architect initially renders a schematic of the complete structure without concern for the individual placement of each brick. This is a blueprint or the Goal. Once the blueprint, or goal is defined, then the builder begins to decide what is necessary to support the blueprint, and actually produce the plan. The specific actions that will support the Goals of the plan are the objectives. Objectives describe the actions and activities that will achieve the Goals. It is necessary to develop supporting objectives for each of the goals to be certain that they become reality.

Goals and Objectives work together. The Goal being the plan, or what you want to achieve, and the Objective detailing how you are going to do it. When developing Goals you should articulate your plans in broad terms. Then when defining relevant Objectives you can and should be very specific about how each of your Goals are going to be satisfied.
"Objectives are useful tools in the creation, implementation, and evaluation of a design. They are useful in pointing to the content and procedures that will lead to successful design, in helping to manage the Design process itself, and in helping to prepare the means of finding out whether the design has been successful."

—Robert Keough from Robert Mager

An Objective is a description of a performance or action you want the audience to be able to demonstrate before being considered competent. AN OBJECTIVE describes an intended RESULT of a process undertaken.

This category is concerned with the CHARACTERISTICS of a usefully stated objective. Its purpose is to help you specify and communicate the intents you feel are worth achieving. If this section achieves its objective, you will be able to recognize the characteristics of USEFUL OBJECTIVES and write effective objectives for your own proposals.

Specifically, given any objective in a subject area with which you are familiar, in all instances be able to identify (label) correctly the PERFORMANCE, the CONDITIONS, and the CRITERION of acceptable performance when any or all those characteristics are present."
Properly written, explicit objectives are important for a number of reasons. Three of the most significant are listed below.

When clearly defined objectives are lacking, there is no sound basis for the selection of media, tools, methods, or message content. If you don't know where you're going, it is difficult to select the most appropriate means for getting there. The designer must have a clear focus of what is to be accomplished through a particular design piece before work can begin. Without the ability to develop a vision of the expected outcomes of a project the creative effort may well be in vain.

*A composer can't begin to orchestrate a score before he is aware of the effect he wishes to achieve* — Robert Mager

Second:
The second reason for stating objectives clearly has to do with finding out whether the objective has, in fact, been accomplished. It is impossible to measure the effectiveness of a design product if the products' communicative qualities haven't been clearly defined from the start. Without objectives the designer has no means of determining the successfulness of a finished product.

Third:
A third advantage of clearly defined objectives is that they provide designers (creative teams) with the means to organize their own efforts toward the accomplishment of objectives. With clear objectives in sight designers are better able to make critical decisions about what activities (in particular) will help them satisfy the communication goals of each project.
A useful objective is one that succeeds in communicating the intended result of a design product. It is useful to the extent that it conveys to others a picture of what the designer planned to communicate with a given project, and thus naturally provides a means of measuring a design's effectiveness in terms of the original communication objectives. In conveying to others the desired outcomes of a piece it is critical that you communicate your intent exactly as you understand it. The writer of behavioral objectives then needs to be concerned with using the proper terminology to ensure his intent is articulated properly. A properly stated objective then is one that communicates your specific intent, and excludes the greatest number of possible meanings other than your intent. Misinterpretation is the greatest single contributing factor to improperly or poorly stated objectives. Consider the differences in specific meaning between 'words open to multiple interpretations', and 'words open to fewer interpretations'.

**Words open to Multiple Interpretations:**
- to know
- to understand
- to really understand
- to appreciate
- to fully recognize
- to grasp the significance of
- to enjoy
- to believe
- to have faith in
- to internalize

**Words open to Fewer Interpretations:**
- to write
- to recite
- to identify
- to sort
- to solve
- to construct
- to build
- to compare
- to contrast
- to smile

The development of a format to use when writing objectives provides for consistency, allows for flexibility, and ensures the objective clearly communicates an intent. The format has three characteristics, and answers three questions:

1. **Performance:** An objective always says what the audience is expected to be able to do; the objective sometimes describes the result of the action.
2. **Conditions:** An objective always describes the important conditions (if any) under which the performance is to occur.
3. **Criteria:** Wherever possible, an objective describes
This segment will detail the second of three characteristics necessary in an effective objective, that of conditions.

Often times certain conditions may affect the 'performance' characteristic of an objective. These surrounding conditions may also vary from time to time. Therefore when preparing objectives it is necessary to define explicitly the conditions under which the expected performance is to occur. By doing so we can go one step further to ensuring that our intent is understood.

The key issue here is to describe in the objective the situation, or 'conditions' surrounding the performance.

For instance: *When designing a billboard some conditions that are of importance are: speed at which the audience passes the intended message, possible weather conditions, daytime vs. nighttime viewing, traffic patterns, etc.*

In a statement of 'billboard project objectives' it would be necessary then to articulate the performance in terms of the specific conditions present at the time of viewing. A billboard designed to be clearly legible in a blizzard would differ greatly from a sign designed to be legible primarily during sunny daylight hours.

The next question to be addressed is: how detailed should you be in your description? Is there a need to document every imaginable situation, how much detail is enough, or necessary? Effective objectives should be detailed enough to be sure the desired performance is recognized by the client, and detailed enough that others *understand your intent* as you understand it. If it is necessary to provide lengthy documentation, then do so. It is always better to be concise and assume nothing.

**CONSIDER THE FOLLOWING EXAMPLES**
--with the addition of specific conditions

1.0 After viewing the new corporate logo only once the audience will be able to *write* the name of, or *describe* the 'company colors'.

2.0 Upon seeing the exhibition poster from a distance of 20 feet the audience will be able to *write* the time, date, and place of scheduled opening.

3.0 After reading the instructional manual once the reader will be able to *improve* the products performance.

4.0 Once the audience has seen the billboard after dark they will be able to *recall* the imagery, and *repeat* the tagline.

5.0 After reading the company policy on harassment several times the audience will be able to *state* two actions that would be considered harassment.

**PERFORMANCE / CONDITIONS SUMMARY:**
1. An objective describes an intended OUTCOME of a given design piece/project.
2. An objective always states a (*performance*)
This segment will detail the third of three characteristics necessary in an effective objective, that of Criteria.

After having described what you expect your audience to understand, you can increase the communication power of an objective by specifying HOW WELL you would like them understand. This is accomplished by describing the criterion of acceptable performance.

A criterion is the standard by which performance is evaluated, the yardstick by which achievement of the objective is assessed.

It is important to understand that when you specify criteria you need to specify the desired criterion, and not merely a minimum. Criterion can vary greatly from that of barely acceptable to outstanding performance. Therefore it is critical to outline explicitly how well the audience must be able to perform to be considered successful, whether that desired performance is to be a basic understanding of the message, or perfect recollection of the information presented.

The three most common methods of indicating criterion are: speed, accuracy, and quality.

1. SPEED

The first is speed. One way of describing a criterion of acceptance is to describe a time limit within which a given performance must occur.

Example: Once the audience has seen the billboard after dark they will be able to recall the imagery, and repeat the tagline UP TO 24 HOURS LATER.

"Up to 24 hours later" places a time limit criterion on the audience performance.

2. ACCURACY

The second is accuracy. The audience's understanding and retention of the message or imagery in relation to the actual information is considered the level of accuracy to which the message is understood.

Example: After reading the company policy on harassment several times (three) the audience will be able to state TWO ACTIONS that would be considered harassment.

"Two Actions" places an accuracy component on the audience performance.

3. Quality

Condition, or Criterion?

Many times is is not easy to read an objective and determine whether a statement is a condition, or criterion. It is not always necessary, or appropriate to be able to do so, the important thing to keep in mind when writing objectives is that a good objective communicates intent specifically, and clearly. If your statement answers the questions below it is probably a very useful objective.
Congratulations, you have written your project "Objectives".

The next step in the project planning process is to write Objectives for your project. In order to do so within this application you should click the "Success Indicators" button below, or refer back to the "MAP" for further assistance.

Keep in mind that the information yet forthcoming in this application may shed new light on your proposal. Feel free to make necessary changes in a previous category by clicking on the topic area below, and then clicking 'edit' from the menu at the lower left. "EDIT" will take you directly to the card on which you entered information pertinent to the given category.
In order to demonstrate how to formulate and utilize effective success indicators, the following examples have been provided. Each of the "Indicators of Success" listed below refer to their corresponding numbered "Objective" in the field at the left.

**Example Indicators of Success**

1. The audience will be able to name the company colors 'midnight blue' and 'canary yellow', or describe them as dark blue and bright yellow.

2. The audience will be able to recall the time of the opening, the location, and the scheduled date.

3. The audience will be able to utilize three of the products’ extra benefits. (In the case of a CD player for example) 1) program the unit to play six discs consecutively, 2) program the unit to play songs from several different discs in a specific order, and 3) program the unit so shut off automatically after a certain time.

4. The audience will remember the make, color, and model of the car shown on the billboard. The audience will be able to repeat the tagline: "The ultimate driving machine."

5. The audience would be able to describe at least two actions the company considers to be harassment or of a discriminatory, or degrading nature.
1. After viewing the new corporate logo the audience will be able to **write** the name of, or **describe** the 'company colors'.

2. Upon seeing the exhibition poster the audience will be able to **write** the time, date, and place of scheduled opening.

3. After reading the instructional manual the reader will be able to **improve** product performance.

4. Once the audience has seen the billboard they will be able to **recall** the imagery, and **repeat** the tagline.

5. After reading the company policy on harassment the audience will be able to **state** two actions that would be considered harassment.
The project "Mission Statement" is to be articulated in very general terms. It is to be used as a forum in which to state in the broadest of terms what the project will attempt to accomplish. It is also the appropriate place to list generally all that might be accomplished above and beyond specific objectives.

The ideal "Mission Statement" will address the following issues:

**Who, What, When, Where, Why, and How.**

**Who** is the target audience?

**What** will your project do?

**When** will the project be complete?

**Where** will the project be implemented?

**Why** are you proposing the project?

**How** are you going to accomplish the project?

The following may be useful things to consider before you articulate your "Mission Statement."

**Who** - define any and all possible audiences or any other groups, individuals, or organizations that may have interest or benefit from your work, who will be involved in the project.

**What** - what is your project, what will it do, what won't it do, what do you think it might do, what do you wish it could do, what will the finished outcome be, mass produced, or only one.

**When** - when will the project be complete, when will it be in prototype stage, when would you like it to be complete?

**Where** - where will it be: local, regional, national, global, public or private space, exclusive or general access, in several locations (distribution), or a central location.

**Why** - why are you addressing this issue, what is the problem or situation you feel needs to be altered, what situation are you attempting to improve, why do you think your work is necessary, why is it important to address the issue now.

**How** - how are you going to solve the problem, what techniques, input, sources, technology, funding, etc. will you utilize, how will the finished product look.

- Consistency in the project.
- Develop a listing of the factors involved in each of the "words" sections.
- Look at the big picture.
- Integrate it all together (table).
- Dialogue boxes.
As designers we initiate the use of vast amounts of paper and other substances that are products of irreplaceable natural resources. It is important that designers be aware of this fact, and that much of what we will produce eventually will become garbage. Our potential to reduce waste or abuse natural resources is great, as a result we should be conscious of our options when related to the way in which we use resources.

The following issues areas of concern:

**Resource Concerns:**
- **Economic resources** - efficiency, productivity, quality
- **Environmental resources** - minimize waste, use of recycled papers, soy-based inks.
- **Natural resources** - maximize materials used.
- **Human resources** - quality, efficiency, most appropriate people to perform tasks.
- **Technological resources** - apply technology when appropriate.
Write a project
Mission Statement

A Mission Statement is a very general, brief statement of intent. It should not exclude any possible outcome of the project, and be in the broadest of terms. Allowing for multiple interpretations is appropriate at this stage of the proposal. Through development of Goals, Objectives, Indicators of Success, and Processes and Strategies the proposal naturally evolves to provide a very concise accounting of all that the project will entail.

Mission Statement

Title
"A/The..." is a [result] that will [action] to this end [outcome].

Title:

[Result]

[Action]

[Outcome]
The purpose of specifying "design criteria" is to assist in the development of relevant project goals. After your client meeting you should now be able to determine what some project criteria may be. Keep in mind the problem to be solved through your efforts, the constraints already defined, the clients expectations of your performance, as well as anything else relevant to this particular assignment, or client, or that matter. Later you will need to specify a listing of final design criteria from which to write project goals.

See relationship to "specify final design criteria" in "goals".
When you begin to articulate your project goals it is important to think in terms of a hierarchy. Each of your goals has a relative level of significance in relation to the other goals in your list. You should prioritize your goals in terms of a hierarchy from most to least important. By doing so you will establish a process by which to design. The process should be one of a problem solving nature, and when implemented with a hierarchy list of project “Goals” will render a step-by-step problem solving approach to arriving at a successful and effective solution.

When developing a hierarchy you should list your Goals from the most important first, to the goals least crucial to a successful outcome last. Ask yourself the following questions: “What is the most important thing this project must do?” Place that Goal first. “What else do I want the project to do?” Enter the ensuing Goals next. “What else might the project do (realistically)?” List the following Goals last. You will then have prioritized your “Goals.”

The list of goals will then assist you in focusing your creative efforts on the project within the proper context. It will enable you to solve the problem in a structured, orderly, and appropriate manner, placing importance on the truly critical issues surrounding the project, and placing lesser importance on the relatively more trivial issues. Your goals will also naturally correspond to the time and budget in that you will know at the outset of a project which areas are crucial and will thus require ample time for development to ensure a successful outcome.
Goals and Objectives are closely related, this section will explain the process of developing Goals, and their relationship to objectives.

Goals are broad, whereas Objectives are specific.

By nature a goal is not specific, it is a statement about a state other than the present that is deemed worthy of achieving. It is what you would like to see happen as a result of your efforts. Also, it is the purpose for and motivation behind your project. A goal theoretically represents the reason why you have chosen to work on a given project, that it states what your efforts hope to accomplish, or the situation you hope to affect. Due to all that a "Goal" represents it absolutely must be defined in broad terms.

A "Goal" doesn't necessarily define how results will happen, it just states what will happen. Keep in mind from the outset that a "Goal" needs only to be a statement of the state you hope to achieve. It should be phrased in very general terms, and you should then define how that will happen with an objective.

why is goal sometimes bold, sometimes not? (same w/ objective)

aim for consistency
Specify final design criteria

In the previous section you were asked to develop a list of "Preliminary Design Criteria". The purpose of doing so was to get you thinking about your projects' Goals at a very early stage. As you can see your "Preliminary Design Criteria" have been provided for reference below to use when specifying your "Final Design Criteria". Your final criteria will be useful in writing Goals by helping you to specify in terms of goals each of your important design criteria.

Preliminary Design Criteria

Final Design Criteria:
1.0
This segment will detail the second of three characteristics necessary in an effective objective, that of conditions.

Often times certain conditions may affect the 'performance' characteristic of an objective. These surrounding conditions may also vary from time to time. Therefore when preparing objectives it is necessary to define explicitly the conditions under which the expected performance is to occur. By doing so we can go one step further to ensuring that our intent is understood.

The key issue here is to describe in the objective the situation, or 'conditions' surrounding the performance.

For instance: When designing a billboard some conditions that are of importance are: speed at which the audience passes the intended message, possible weather conditions, daytime vs. nighttime viewing, traffic patterns, etc.
3. To prepare an **objective describing intent:**
   
   **A.** Write a statement that describes the main performance you expect of the audience.

   **B.** Rephrase the statement until it answers the question: "What is the audience **doing** when demonstrating achievement of the objective?"

   **C.** Describe relevant or important conditions under which the performance is expected to occur. If it seems useful, add a sample test item. Add as much description as is needed to communicate the intent to others.
What is the main intent of the objective?
What does the audience have to do to understand to demonstrate achievement of the objective?
What will they have to do it with/or without?
How will you know when the performance is good enough to be considered acceptable.

FINAL OBJECTIVES SUMMARY:

1. An **objective** is a collection of words, symbols, and/or pictures describing one of your important intents.

2. An objective will communicate your intent to the degree you describe what the audience will be doing when demonstrating achievement of the objective, the important conditions of the doing, and the criterion by which achievement will be judged.

3. To prepare a useful objective, continue to modify a draft until these questions are answered:
   - What do I want the audience to be able to do or understand?
   - What are the important conditions or constraints under which I want them to perform?
   - How well must they understand my message for me (client) to be satisfied?

4. Write a separate statement for each important outcome or intent; write as many as you need to communicate your intents.
to alter

to arrange

to bisect

to build

to calculate

to captivate

to carve

to chart

to circle

to cite

to combine

to compare

to compose

to complete

to compute

to construct

to contrast

to conduct

to connect

to create

to deduce

to define

to describe

to design

to develop

to differentiate

to discriminate

to discuss

dissect?

to draw

to duplicate

to elaborate

to evaluate

to experiment

to explain

to express

to extrapolate

to feed

to fill out

to find

to formulate

to gather

to generalize

to identify

to illustrate

to imitate

to improve

to infer

to integrate

to interpret

to investigate

to itemize

to justify

to list

to locate

to measure

to memorize

to name

to organize

to paint

to pantomime
Write Project Objectives

The keyword listing at the right is provided to enable you to be as specific as possible in determining objectives. Write your Objectives in the bottom field while referring to your Goals above. Be certain to articulate enough objectives to ensure all "goals" are satisfied.

GOALS

3.0 Hypothetical goal number one: To provide public transportation to all those needing the service within a ten mile radius of RIT.

OBJECTIVES:

1.0

- Mission
- Goals
- Objectives
- Success Indicators
- Processes & Strategies
Example Goal

APPLICATION:
Design Planner will:
1. Provide the user with a friendly and highly interactive interface.
2. Have an accompanying user manual.
3. Provide a project proposal template structure that can be applied to any project, and help users to develop a creative project planning and management tool.
4. Allow for flexibility.
5. Help users to develop and achieve communication objectives.
6. Help users to define explicitly what will be achieved through the production of a given piece.
7. Utilize an appropriate visual metaphor.
8. Allow for a broad to narrow operational process.
9. Ensure users have considered appropriate cultural, societal, technological, environmental, and economic issues that may influence their work.
10. Define objectives in behavioral terms.
11. Assist users in developing both Formative and Summative objectives.

METAPHORICAL:

<table>
<thead>
<tr>
<th>Mission</th>
<th>Goals</th>
<th>Objectives</th>
<th>Success Indicators</th>
<th>Processes &amp; Strategies</th>
</tr>
</thead>
</table>

Map | Return | Print

The blueprint is the \textbf{Goal.}
(always arrange these consistently where possible...)}
Example Timeline

**APPLICATION:** Note, this is an abbreviated timeline, I utilized (and would recommend) MacProject software in the development of my thesis project timeline.

Design Planner® Timeline
Project start: 9/1/91
Project complete: 5/15/92


---

Timelines are very project-specific, and can vary greatly between tasks. A timeline can range from an hour to hour accounting of activities, to merely a project start and completion date. The key is that you develop a functional timeline for your project.

MacProject software may be of assistance.
Example Success Indicators

APPLICATION:
1. Are users consistently able to write, save, and later revise project proposals that include: Mission statement, Goals, Objectives, Success Indicators, and Processes & Strategies of Implementation?
2. Are projects completed with the aid of Design Planner® successful in achieving appropriate communication objectives?
3. Is the interface being used frequently, and thought of as an asset?
4. Is the interface flexible enough to expand its use into project planning and management activities in fields other than graphic design?
5. Was the MFA conferred?

METAPHORICAL:
After dreaming about the house, planning it, and building it, . . . What are some "Indicators of Success"?
Consider the following "Indicators":
Do you like it?
Will you ever move, or build a new home again?
Does your family/spouse like it?

<table>
<thead>
<tr>
<th>Map</th>
<th>Quit</th>
<th>Return</th>
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<table>
<thead>
<tr>
<th>Mission</th>
<th>Goals</th>
<th>Objectives</th>
<th>Success Indicators</th>
<th>Processes &amp; Strategies</th>
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<td>Print field</td>
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</tr>
</tbody>
</table>

"Well, now that its built, is it everything you had hoped for, or does it have shortcomings?"

"thought unit typography" may help in some cases to provide a standard for line breaks

more space
The Design Planner Process

The first step in the Design Planner process will ask you to address the project "Mission Statement."

The mission statement is a lofty description of the project. Goals, objectives, and processes and strategies of implementation will then ensure the initial "mission" is achieved.

Processes and Strategies of Implementation

After stating the "mission" you will move on to articulate "Goals" that will support it.

Goals literally "support" the mission by dissecting it into its many parts, seeing each component as a goal to be achieved.

A problem-solving approach is then adopted by regarding each of the goals as a small problem to be solved in the process of satisfying the "Mission."

Processes and Strategies of Implementation

After stating your goals, you should move on to writing your "Objectives."

Objectives support the project's goals. Objectives determine specifically what type of performance an action is necessary to satisfy each goal. It may be necessary to specify more than one objective for each goal to ensure each goal is successfully achieved.

Processes and Strategies of Implementation

"Processes and Strategies of Implementation" support the entire process from mission through objectives.

The "Process and Strategy" is where you should describe exactly how you plan on going about meeting the objectives that support each goal. In turn ensure the project is successful in satisfying the original mission.
The dynamic process continues, making appropriate changes when necessary until the project is deemed successful in terms of the original communication objectives.

Another way of visualizing the process is to think of the project as an architectural structure. Its outer edges represent the complete form.

Upon closer inspection we can see that the whole is a product of its many integral parts, each dependent on the others.

Design Planners use the brick as a metaphor to illustrate this relationship.
Determine priorities

You can begin to develop a hierarchy of essential goals by prioritizing your project's needs now.

If you think of the design process as an exercise in problem solving you will begin to see that the successful outcome of your project is the result of a systematic approach.

In order to solve the problem you will design a product that meets the specific needs of your communication objectives. Some needs might be critical; others will be less important relative to a successful creative solution. Naturally, you will address the broader, more important issues before those of lesser significance.

You can be certain to address objectives in the proper hierarchical sequence by prioritizing your needs from most to least important. In doing so, you will have developed a step by step creative problem-solving process to use in pursuit of the ideal solution to your problem.

Specify Preliminary Design Criteria

The purpose of specifying "design criteria" is to assist in the development of relevant project goals. After your initial client meeting, you should be able to determine what some project criteria may be. Keep in mind the problem to be solved through your efforts, the constraints already defined, the client's expectations of your performance, as well as anything else relevant to this particular assignment. Listing "Final Design Criteria" will be an important step toward writing goals.

Preliminary Design Criteria

Hello, I hope this is working, oh boy.

blah blah blah, this is meaningless driplllllllllllllll

Worthless in meaning, but it is type

Move on to Goals

Congratulations, you have written your project "Mission Statement".

The next step in the project planning process is to determine relevant project goals. In order to do so within this application you should click the "GOALS" button below, or refer back to the "MAP" for further assistance.

Keep in mind that the information yet forthcoming in this application may shed new light on your proposal. Feel free to make necessary changes in a previous category by clicking on the topic area below, and then clicking 'edit' from the menu at the lower left. "EDIT" will take you directly to the card on which you entered information pertinent to the given category.
**Indicators of Success**

*Indicators of Success* are an integral part of any planning, management, or design process. Their purpose is to articulate and measure the accomplishment of the objectives. They can also be used to evaluate and monitor progress during the design process.

"Indicators of Success" work with "Goals" and "Objectives", they are a format in which to define factors that will be used to evaluate and measure progress against. They provide the user with a self-correcting mechanism that will ensure maximum effectiveness in both process and product.

**Evaluation Issues**

1. Are the Goals and Objectives of the project being achieved?
2. Are the activities being conducted as planned?
3. Are resources being properly allocated?
4. Are activities being carried out on time?
5. Are any areas becoming problematic or might something need to be modified or adjusted?
6. Are the projects' intended outcomes being achieved?
7. Is the project successfully achieving its objectives and overall goals?

**Indicators of Success are necessary**

Evaluation is a critical component of this application. Due to the potential impact of their work designers need to be concerned not only with how much work they produce, but also how successful the work is in terms of:

What it is communicating, to Who, How, Where, and Why.

By reviewing the questions listed at left you will be aware of areas that should be closely monitored. By monitoring your design process in relation to your "Objectives" you will have a clear understanding of how the project is progressing toward an effective solution. Keeping in mind problem areas will help you to make corrective measures in time to avoid any possible failures.

**Indicators of Success and Objectives**

The measure of achievement must be related to a starting point. In this case your project "Objectives". It is not enough to simply state an objective, the objective must be seen in context with the existing pre-condition in order for its true effectiveness to be measured.

Indicators of Success are necessary to clarify Objectives, clarify Goals.

Specify "Indicators of Success" for each project objective to be thorough.

**Objectives**

1. After viewing the new corporate logo the audience will be able to:
2. Upon seeing the exhibition poster the audience will be able:
3. After reading the instructions in the manual the reader will be able to:
4. Once the audience has seen the billboard they will be able to:

**Using Indicators of success**

In order to demonstrate how to formulate and utilize effective "Indicators of Success" the following examples have been provided. Each of the success indicators listed below refer their corresponding numbered objective in the field at the left.

**Indicators of Success**

1. The audience will be able to:
2. At least 25 people will attend the exhibition.
3. The audience will be able to:
4. The audience will remember the make, color, and model of the car shown on the billboard. The audience will be able to repeat the tagline: "the ultimate driving machine."
Write Indicators of Success

Your project Objectives have been included in the field below so that you may refer to them when writing "Indicators of Success." In order to be thorough you should specify at least one indicator of success for each objective.

Indicators of Success

1.0 this is the first test text objective.

Example Success Indicators

APPLICATION:
Design Planner® Indicators of Success
1. Are users consistently able to write, save, and later review project proposals that include: Mission statement, Goals, Objectives, Success Indicators, and Processes & Strategies of Implementation?
2. Are projects completed with the aid of Design Planner® successful in achieving appropriate communication objectives?
3. Is the interface being used frequently, and thought of as a great asset?
4. Is the interface flexible enough to expand its use into project planning and management activities in fields other than graphic design?
5. Was the NFA certified?

METAPHORICAL:
Do you like it? What are some "Indicators of Success"?
Do you like it? Will you ever move, or build a new home again?
Does your family spacious like it?
Processes and Strategies of Implementation

The purpose of clearly defining a "Process & Strategy of Implementation" by which to solve a problem is important for a number of reasons:

1. It will help the creative team develop and use a problem solving approach to satisfying the clients' needs.
2. It will provide a formal list of the planned tasks that will be undertaken in the process of reaching the optimal solution (this will help in time management and documentation of billable time relative to in-house cost).
3. It will provide a timing of activities that can be reviewed with the client and creative staff to ensure every possible solution has been examined carefully. Be assured of all possible solutions examined.
4. It provides formal documentation of the design process undertaken to reach the given solution in both formal and summative terms.

Develop a Timeline

A Timeline or schedule is an essential part of any planning document. It states when the project will be finished, as well as determines benchmark dates during the development of the project.

Timelines can be thought of at the micro or macro levels, and will inversely change from project to project. They often need to be modified during the development of a project. It is important to have a beginning timeline however so that the time constraint inherent in every project is addressed at the project's inception. The timeline will assist in allocating time to tasks necessary in the design process. It will also further illustrate the relative significance of certain tasks to others.

*Keep in mind the listing at left of possible deadlines you may need to schedule and meet. The list is not by any means conclusive, portions of it may not be of importance, and it also may omit issues of relevance to your project.

Processes and Strategies of Implementation

Implementation is the step in the problem solving process where an idea is chosen and brought to fruition. In order to do so a "Process & Strategy of Implementation" is necessary. It will state how you are planning on going about satisfying the objectives set forth earlier. It is the active state of solving the problem. It is the time to put the plan into action.

*Now that you have planned your work, it's time to work your plan.

In order to better understand what this means to you and your tasks consider the analogies listed above.

Remember to Consider:
1. Research.
2. Ideation / Brainstorm.
3. Tactile solution development.
5. Refinement of several solutions.
6. Presentation of final options.
7. Refinement of selected solution.
8. Client approval for production.
9. Production time.
10. Distribution time.

*NOTE: the listing above is not a listing of suggestions of possible costs.
Appendix 8
Design Planner® Application
Appendix 8.1

Introduction
Navigator Map
Creative Planning Process Diagram
Design Planner Process Diagram
Design Planner

Welcome to Design Planner C, an interactive planning guide for the process of design. This application was created using Applesoft software, Hypercard 2.0.

After reading the remainder of this introduction click the forward arrow to view a sequence designed to provide further insight into Design Planner C, and help to explain its mission, purpose, etc.

Map Quit Return

Introduction

This application will help you to formulate and articulate your design process in a problem solving approach through a series of steps. After using the Design Planner C you can expect to have written a project proposal that will include; a project Mission Statement, Goals, Objectives, Indicators of Success, and Processes and Strategies of Implementation.

After completing the introduction segment you will arrive at a map illustrating how each of the many components in this application are related. The "Map" will function as the main navigational tool. At any time you may refer back to it and select your own path through the information by clicking on any button. First time users of the application should take the time to read the information in each area, and begin at the "Mission Statement." Upon completion of your proposal you may save it for later reference, and print a copy for your own personal use, or for a client.

Map Quit Return

The Creative Planning Process

The diagram you will see next is a visual interpretation of the Creative Planning Process and is designed to demonstrate the different components of a successful project management plan. An animated sequence has been included to demonstrate the dynamic process involved in planning and managing a project, and also to demonstrate how the Creative Planning Process Diagram addresses the six critical questions a sound project planning and management proposal should address: Who, What, When, Where, Why, and How.

Design Planner C should be seen in context with the total process. It is the product of a synthesis of the many different activities conducted within each phase of the Creative Planning Process.

Map Quit Return

Statement of purpose

Design Planner C was developed to improve the quality of graphic communications. The thesis I present is this: "Graphic communications are often misunderstood, or inappropriate due to a designer's negligence in completely understanding the communication objectives of the problem."

In developing this application I will contribute to the profession of visual communication by providing a tool that will enable users to produce a document stating explicitly what they intend to accomplish through a project. By following the process outlined in this application the designer will be continually reminded of their goals and objectives as they design, helping to produce an effective solution. Furthermore the project proposal the application will render is a powerful design planning and management device for both in-house and in outside client interaction.

The interface will bring the entire proposal process to the user in a highly interactive format. Interactivity

The Creative Planning Process

Manage

Evaluate and make decisions

Conduct project

Design and plan evaluation strategies

Device / Apply rationale and standards

Implement the planned design process
The Design Planner® Process

The illustration at right represents the organizational hierarchy utilized by Design Planner®.

The process begins with the development of the 'Mission Statement.' Then the 'Goals' are written to support the mission. The next step is to write 'Objectives' that support the goals, and finally 'Processes and Strategies of Implementation' are developed to support the objectives.

After stating the 'mission,' you will move on to articulate 'goals' that will support it.

Goals literally 'support the mission' by decomposing it into its many parts, stating each component as a goal to be achieved.

A problem solving approach is then adopted by regarding each of the goals as a small problem to be solved in the process of satisfying the 'Mission.'
The Design Planner: Process

Design Planning is a dynamic process. The planning begins with a Mission, followed by Goals to reach the mission. Objectives to satisfy each particular Goal, and lastly a Process and Strategy of Implementation to achieve each of the aforementioned activities. The plan becomes dynamic during the design process as the completion of each step begins to support the one above it.

...which in turn achieve the original Mission.

The planning begins with the Mission and is followed by the process of defining how the mission will be achieved. The implementation begins with the Process, or the action of completing the plan. The process begins with the Mission, or development of the plan.

"Processes and Strategies of Implementation" support the entire process from mission to objectives.

The "Process and Strategy" is where you should describe exactly how you plan on going about meeting the objectives that support each goal, that in turn ensure the project is successful in satisfying the original mission.
The plan is cyclical and under constant revision as the design process evolves.

The dynamic process continues, making appropriate changes when necessary until the project is deemed successful in terms of the original communication objectives.

Ultimately, the design process is a whole consisting of many smaller parts. Each step in the process performs a specific function towards the successful completion of the project's mission.
The navigator map allows you to access information within the stack interactively. By clicking on any rectangle, or button you can go directly to that card within the stack. The illustration represents each of the components within this application. The areas you have covered already have been tinted. As a first time user you should click on the "Mission Statement" button in order to begin.

The navigator is provided to give you greater control over information by allowing you to chose your own path through the application, accessing all or only parts of the text.

Bibliography


Design Planner was developed as a MFA Thesis project at Rochester Institute of Technology during the 1991-1992 academic year by Roy Prochaeka Jr. The project fulfilled the Thesis requirement in the Graphic Design department within the College of Fine and Applied Arts. Any reproduction in whole or in part of Design Planner® without the expressed written consent of R. Prochaeka Jr. is prohibited.

For all of their help, advice, and support,
Special Thanks to:

Mr. & Mrs. Bette Lu & Roy Prochaeka Sr.
Mr. Joseph Prochaeka, posthumously
Mr. Luther Jarpa
Mr. R. Roger Remington
Ms. Deborah Bevoldson
Mr. Mark Colliten
Dr. Chuck Plummer
Mrs. Becky Lesby
Mr. Jorge Frescura
Mr. Robert Carugh
Dr. Joanna Szable
Mr. James VanHagen
Kappa Sigma Fraternity
Appendix 8.2
Mission Statement
Determine priorities

You can begin to develop a hierarchy of eventual goals by prioritizing your project's needs now.

If you think of the design process as an exercise in problem solving, you will begin to see that the successful outcome of your project is the result of a systematic approach.

In order to solve the problem you will design a product that meets each specific need of your communication objectives. Some needs will be critical, others will be less important relative to a successful creative solution. Naturally you will address the broader, more important issues before those of lesser significance.

You can be certain to address objectives in the proper hierarchical sequence by prioritizing your needs from most to least important. In doing so you will have developed a step by step creative problem solving process to use in pursuit of the ideal solution to your problem.
Example Mission Statement

APPLICATION:
There is currently no tool available that will enable designers to help define a problem and then outline a process that will produce an effective solution for the problem. 'Design Planner' will assist in improving the quality of graphic communications by providing users with an interactive tool that will identify the creative process and ensure the identified communication 'objectives' are achieved.

METAPHORICAL:
A Mission Statement is a dream home, a thought of perfection. A product unbowed by limitations of any kind, a vision brought to reality. It is a statement detailing everything included in the ultimate solution without regard for that which might not be possible.
Appendix 8.3

Goals
**Design Planner**

**Goals**

Goals and objectives are closely related, this section will explain the process of developing Goals, and their relationship to objectives.

**Goals are lofty where as objectives are specific.**

By nature a goal is broad, it is a statement about a condition other than the present that is deemed worthy of achieving. It is what you would like to see happen as a result of your efforts. Also, it is the purpose for and motivation behind your project. A goal theoretically represents the reason why you have chosen to work on a given project. It states what your efforts hope to accomplish, or the situation you hope to effect. Due to all that a goal represents it absolutely must be defined in broad terms.

**The Utopian vision**

One of the many things that a hierarchy of Goals can allow for is a Utopian Vision. The "Utopia" being the ultimate solution, the answer to the problem without the burden of constraints.

The dictionary defines a 'utopia' as:

"an impractically idealistic goal or scheme"

Furthermore it helps to motivate designers in that it presents an almost impossible state of achievement to aim for, in the process of doing so it also helps to further clarify what a satisfactory level of achievement will be within the project Goals. This translates into several levels of goals:

- those that are essential,
- those that are perhaps possible,
- and those that would provide for the 'utopian' solution.

**The importance of a hierarchy of goals**

As you begin to articulate your project "Goals" it is important to prioritize. Each of your goals has a relative level of significance in relation to the other goals in your list. You should prioritize your goals from the most to the least important. By doing so you will establish a process by which to design. The process should be one of a problem solving nature and when implemented with a prioritized list of project "Goals" will render a step by step problem solving approach to a successful and effective solution.

The list of goals will assist you in focusing your creative efforts on the project within the proper context. It will enable you to solve the problem is an structured, orderly, and appropriate manner, placing the most importance on the truly critical issues surrounding the project. Your goals will also naturally correspond to the time and budget available. Through this approach you will know at the outset of a project which areas are crucial and which require relatively more time for development to ensure a successful outcome.

**Goals in relation to Objectives**

Objectives are a function of Goals. A Goal Statement describes a desired state, and the supporting Objective explains specifically what activities will be necessary to achieve the desired state. Therefore it is necessary to develop Objectives that will accomplish the intent of each Goal.

In summary Goals and Objectives work together. The goal being the plan, or what you want to achieve, and the Objective detailing how you are going to go about it. When developing your goals you should articulate your hopes in 'lofty' or very broad terms. Then when defining relevant Objectives you can be very specific about how each of your Goals is going to be satisfied.
How to develop Goals

The actual development of Goals is a process in which you articulate that which you are hoping to accomplish through the completion of a given project. It is important to be thorough and provide full documentation of all that you are planning on accomplishing. It is also important to be certain that what you specify as a “Goal” is possible to accomplish given the project constraints. Do not list everything you imagined in your “Chips” as a true Goal.

Keep in mind that you had better make sure you live up to your own expectations (in terms of goals) when the project accomplishments are evaluated.

The following five step process will serve as a transition to writing objectives, and also assist you in writing and analyzing goals.

1.0 Write down a goal, in whatever abstract terms best express your intent. Be certain to word the statement in terms of outcomes rather than processes. Doing so will help you to avoid getting the goals of describing what you are doing.

Write project Goals

Goals should be written in relation to the Mission Statement in order to be certain that the goals do in fact achieve the mission. Write one or more goals for each section in your mission, also consider your final design criteria.

Mission Statement

Goals

Move on to Objectives

Congratulations, you have written your project “Goals”.

The next step in the project planning process is to write Objectives for your project. In order to do so within this application you should click the “Objectives” button below, or refer back to the “MAP” for further assistance.

Keep in mind that the information yet forthcoming in this application may shed new light on your proposal. Feel free to make necessary changes in a previous category by clicking on the topic area below, and then clicking “edit” from the menu at the lower left. “EDIT” will take you directly to the card on which you entered information pertinent to the given category.
Appendix 8.4

Objectives
Objectives

Objectives are useful tools in the creation, implementation, and evaluation of a design. They are used to guide the process of design, helping to manage the design process itself, and in helping to prepare the means of finding out whether the design has been successful.

Objectives are a description of a performance or action you want the audience to be able to demonstrate before being considered competent. An objective describes an intended result of a process undertaken.

This category is concerned with the characteristics of a properly stated objective. Its purpose is to help you understand these characteristics, and be able to apply them to your own work. A properly articulated "Objective" is comprised of three components:

Specifically:
- Given any Objective be able to identify the PERFORMANCE, the CONDITIONS, and the CRITERION of acceptable performance when any or all these characteristics are present.

The purpose and benefits of properly written objectives

Property written, explicit objectives are important for a number of reasons. Three of the most significant are listed below.

First: When clearly defined objectives are lacking, there is no sound basis for the selection of media, tools, methods, or message context. If you don't know where you're going, it's difficult to select the most appropriate means for getting there. Objectives enable the designer to see all of the necessary components of a given project in context with its constraints.

Second: The second reason for stating objectives clearly is to do with finding out whether the objective has been accomplished. It is impossible to measure the effectiveness of a design product if the works' communication objectives have not been clearly defined.

Third: A third advantage of clearly defined objectives is that they provide designers (creative teams) with the means to organize their own efforts toward the accomplishment of objectives. With clear objectives in sight, designers are better able to make critical decisions about what activities (in particular) will help them satisfy the communication goals of each project.

Qualities of useful objectives

A useful "Objective" is one that succeeds in communicating the intended result of a design product. It is useful to the extent that it conveys to others a picture of what the designer intends to communicate through a given project, and naturally defines levels of achievement by which success can be measured.

In conveying to others the desired outcomes of a project it is critical that you communicate your intent exactly as you understand it. The writer of behavioral objectives needs to be concerned with using the proper nomenclature to ensure his intent is articulated properly.

Therefore a properly stated "Objective" is one that communicates your specific intent, and excludes any factors that might be misleading. Misinterpretation is the greatest single contributing factor to improperly worded objectives. Consider the differences in specific meaning between 'words open to multiple interpretations', and 'words open to fewer interpretations'.

The importance of well-defined objectives

The usefulness of an Objective can ultimately be hindered by the way the objective itself is structured, or written.

The purpose of an objective is to communicate, and to do so it must be clear and succinct. If the objective fails to communicate, it fails to serve its purpose and is not useful. Clarity is of the utmost importance.

The three characteristics mentioned earlier: Performance, Conditions, and Criteria have been proven to be the determining factors of an effective objective. In order to be certain your "Objectives" are clear it would be helpful to deconstruct them, identifying each of the three crucial characteristics. Remember to be clear, brief, and directly to the point when developing your own objectives.
Move on to Indicators of Success

Congratulations, you have written your project "Objectives".

The next step in the project planning process is to write Objectives for your project. To do so within this application you should click the "Success Indicators" button below, or refer back to the "Map" for further assistance.

Keep in mind that the information yet forthcoming in this application may shed new light on your proposal. Feel free to make necessary changes in a previous category by clicking on the topic area below, and then clicking 'edit' from the menu at the lower left. "Edit" will take you directly to the card on which you entered information pertinent to the given category.

Example Objective

Objectives are the bricks that build the house according to the blueprint.

APPLICAISON:
Design Planner® Objectives:
1. Will allow you to write a Project Proposal that will include a Mission Statement, Goals, Objectives, Success Indicators, and Processes Strategies of implementation.
2. Will allow you to print a copy of the completed proposal.
3. Will allow you to save the proposal for later use, and revision.
4. Will allow you to evaluate projects effectiveness in terms of the original communication objectives.

METAPHORICAL: Once the blueprint, or goal is defined, then the builder begins to decide what is necessary to support the blueprint, and actually produces the plan. The specific actions that will support the goals of the plan are the Objectives.

Objectives Summary

SUMMARY:
1. An objective is a collection of words, symbols, and pictures describing one of your important intents.
2. An objective will communicate your intent by being specific about what the audience will be doing when demonstrating achievement of the objective, the important CONDITIONS regarding the action, and the CRITERION by which achievement will be judged.
3. To prepare a useful objective, continue to modify a draft until these questions are answered:
   - What do I want the audience to be able to do/don't understand?
   - What are the important conditions or constraints under which I want them to perform?
   - How well must they understand the message for me (client) to be satisfied?
4. Write a separate statement for each important outcome or intent; write as many as you need to communicate your intents.

Appendix 8.5

Indicators of Success
Appendix 8.6

Processes and Strategies of Implementation

General Process
Timeline
Budget
**Plan**

Write a detailed implementation plan and include team roles.

**Design**

Develop a detailed implementation plan.

**Process and Strategies**

Implement the plan and monitor progress.

---

<table>
<thead>
<tr>
<th>Mission Goals</th>
<th>Design</th>
<th>Plan</th>
<th>Process and Strategies</th>
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</thead>
</table>
Example Budget

Example Timeline

Write Your General Process 

Strategy

Plan

Implement

Monitor 

Evaluate
Appendix 8.7

Print Proposal
Appendix 9

Exhibition
Design Planner

"If graphic designers wish to be recognized as problem solvers, it is indispensable that they concern themselves with the results of their work measured by achievement of the objectives that generated the need for the production of the visual communication in question."
Jorge Frascara, University of Edmonton, Alberta CA

Where will new media be used?
"New media will find a number of applications. Markets for electronic information services, interactive training materials, and online software documentation are established. Other areas of application will involve business, reference education, marketing, and entertainment."
Toll Almenfinger, Institute of Design, Illinois Institute of Technology

Problem Statement:
In the context of the profession of graphic design there is currently no tool available that will enable a designer to clarify and define a problem, and articulate a process that will render an effective solution to the problem.

Design Planner® is an interactive planning guide for the process of design, created with Hypercard 2.0 software from Apple®. The application helps users articulate their design process in a project proposal format, and adopt a problem solving approach to the creative process. By following the process outlined in the application the user can develop a project proposal for any given task.
The prototype contains a project mission statement, goals, objectives, indicators of success, and processes and strategies.
The Creative Planning Process

The diagram below represents the greater context of project planning and management activities. Design Planner® is a product of the synthesis of many activities conducted within each of the four project management phases noted in the diagram.

The Navigator Map will allow users to dictate their own non-linear path through the application. By using the mouse and 'clicking' on any rectangle the user can move directly to any specific area within the prototype.

The images below are prints of actual screens from the prototype. Represented are the cards on which the user is expected to enter information about their own project specific, Goals, Objectives, and Success Indicators.
Design Planner

Introduction

Philosophy
blah blah blah, greeking to show placement of text within the layout format as proposed, meaningless dribble content wise but does serve a purpose.

Need
for what, a design planner? lah blah blah, greeking to show placement of text within the layout format as proposed, meaningless dribble content wise but does serve a purpose.

Background
for what, a design planner? lah blah blah, greeking to show placement of text within the layout format as proposed, meaningless dribble content wise but does serve a purpose. for what, a design planner? lah blah blah, greeking to show placement of text within the layout format as proposed, meaningless dribble content wise but does serve a purpose. for what, a design planner? lah blah blah, greeking to show placement of text within the layout format as proposed, meaningless dribble content wise but does serve a purpose. what, a design planner? lah blah blah, greeking to show placement of text within the layout format as proposed, meaningless dribble content wise but does serve a purpose.
Design

Table of contents

Planner

Preface
system requirements
loading the software
release rights
Hypercard intro

Introduction
philosophy
need
background
purpose and benefits
context
interface

Mission
what to expect
text
example cards

Goals
what to expect
text
example cards

Objectives
what to expect
text
example cards

Indicators of Success
what to expect
text
example cards

Processes and Strategies
what to expect
text
example cards

Printing a Proposal
how to print
text
saving and editing a proposal

Reference
Bibliography
glossary
Design Introduction

Purpose and Benefits

for what, a design planner? lah blah
blah, greeking to show
placement of text withing the layout
format as proposed, meaningless dribble
ontent wise but does serve a purpose.
for what, a design planner? lah blah
blah, greeking to show placement of text withing
the layout format as proposed, meaningless dribble
or what, a design planner? lah blah
blah, greeking to show
placement of text withing the layout
format as proposed, meaningless dribble

Context

for what, a design planner? lah blah
blah, greeking to show
placement of text withing the layout
format as proposed, meaningless dribble
ontent wise but does serve a purpose.
for what, a design planner? lah blah
blah, greeking to show placement of text withing
the layout format as proposed, meaningless dribble
or what, a design planner? lah blah
blah, greeking to show
placement of text withing the layout
format as proposed, meaningless dribble
Design Planner

An Interactive Planning Guide to the
Level one: Introduction to hypercard, introduction to Design Planner© application.

1. Preface
   system requirements
   loading the software
   release rights (copyright)

2. Table of Contents
3. Hypercard Basics
4. Design Planner© application
   philosophy
   documentation of need
   background
   purpose and benefits
   context (total systems plan diagram).

Level two: Design Planner application in print, with supplementary information, and instruction.

Introduction to Design Planner functionality
   buttons
   fields
   saving
   printing
   notes
   examples

1. Mission Statement
2. Goals
3. Objectives
4. Indicators of Success
5. Processes and Strategies of Implementation
6. Reference
   Bibliography
   Credits

[Handwritten notes: Just last edits. Proposal. See Jane-Arn Abent]
Level one: Introduction to hypercard, introduction to Design Planner© application.

1. Preface
   - system requirements
   - loading the software
   - release rights (copyright)

2. Table of Contents
3. Hypercard Basics
4. Design Planner© context
   - philosophy
   - documentation of need
   - background
   - purpose and benefits
   - context (total systems plan diagram)
   - parallel applications

Level two: Design Planner application in print, with supplementary information, and instruction.

Introduction to Design Planner functionality
   - buttons
   - fields
   - saving
   - printing
   - notes
   - examples

1. Mission Statement
2. Goals
3. Objectives
4. Indicators of Success
5. Processes and Strategies of Implementation
6. Print

7. Reference
   - Bibliography
   - Credits

Illustrations
Descriptive Text
Narrative Titles
Answers are in the content
# Table of Contents

- Preface
- Table of Contents
- Hypercard Basics
- Design Planner Context

- Introduction to Design Planner
- Mission Statement
- Goals
- Objectives
- Indicators of Success
- Processes and Strategies of Implementation

- Reference
- Bibliography
- Credits
Design Planner

Context

Design Planner® exists in the context of other interactive applications designed to assist users within a given area of specialty. Similar commercial applications include; Biz Plan Builder, Idea Fisher, and MacProject.

Design Planner® was developed to assist users in developing and articulating an effective creative process. After using the application designers will have written a project proposal that can be used in client interaction, and as a personal creative problem solving tool. The completed proposal will include: Mission Statement, Goals, Objectives, Indicators of Success, and Processes and Strategies of Implementation. In the process of writing the proposal users will learn about the creative process and develop a systematic problem solving approach to the creative process. By articulating a proposal designers will also provide a standard against which to evaluate their work in terms of its effectiveness at meeting the project's original communication objectives.

If used properly Design Planner® is a very powerful tool, and will help greatly to ensure each creative endeavor is answered with an effective visual solution. The proposal also provides a necessary project planning and management function.

Prior to the development of this application there was no tool designers could utilize to assist in the design process, and ensure clearly defined objectives were successfully achieved within each
assignment. Without considering the original communication objectives of a project it is impossible to measure the outcomes' true success, thus the creative effort is devalued, and perhaps not appropriate. Design Planner® will go a long way toward making sure the creative effort is focused on the correct target, and that the product does in fact achieve critical communication objectives. The ultimate purpose of Design Planner® is to improve the quality of graphic communications. It does so by providing users with a format in which they are continuously reminded of critical design planning and management issues, as well as their own projects' objectives. The application itself is part of a much broader context, that of project planning, management, and evaluation activities. The diagram at left illustrates the Total Systems Plan of which design planner is a product. Design Planner® is the result of a synthesis of the most appropriate processes in the Total plan and other sources.
Table of Contents

Preface
Table of Contents
Hypercard Basics
Design Planner: Context

Introduction to Design Planner:
Mission Statement
Example
Goals
Example
Objectives
Example
Indicators of Success
Example
Processes and Strategies of
Implementation
Example
Print / Save Proposal
Example

Reference
Bibliography
Credits
Hypercard Basics

The Hypercard® interface developed by Apple Computer Inc. utilizes a metaphorical approach to the organization and transformation of information. The metaphor is a note 'card', and each completed project is termed a 'stack' referring to a pile of note cards.

Hypercard development tool for designers of interactive interfaces, as well as a tool for everyday system improvements, scheduling, etc. Hypercard allows the user to control the way in which information is accessed. The concept of user driven information is called interactivity, the user is physically interacting with the information by clicking on buttons that control navigation. By using the mouse to point and click on buttons appearing on the screen the user can control movement throughout any Hypercard application. Buttons may be indicated by a border outline of many different sizes and shapes, can be named with text, and can also carry an easily identifiable icon, such as a forward arrow meaning 'go to the next card in the stack'.

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As mentioned earlier Hypercard projects are called 'stacks'. A stack can function by itself, moving only to cards in itself, or may also work with separate stacks, and their respective cards. Many applications developed in Hypercard are actually multiple 'stacks' working together when necessary. This is the case with Design Planner® as well. The application consists of eight unique stacks that work together based on user input. When starting the application the user should double-click the mouse on the 'dpintro' stack.

Within every interactive interface the need arises to provide a visual context detailing all of the information within an application. Due to the 'interactive' nature of Hypercard applications users will move freely through the information, accessing what is most important at a given time. However at another time the user may wish to tap into a different part of an application's functionality, thus the need to provide a layout of the application and all its components. This is done in the form of an informational chart designed to illustrate each area in the application, and its relation to the whole. This need is satisfied by the "Map" in the Design Planner® Application.
Design Planner

Context

the process of writing a mission, goals, etc. Secondly it is a production tool for the more experienced proposal developer. By using the interface the user can be continually reminded of key factors relating to the assignment at hand as well as produce the proposal in the same application, thus eliminating the need for timely research. By providing a user friendly and highly informative interface Design Planner© will help to improve the quality of visual communications by streamlining an often neglected exercise in the creative process, that of planning and goal setting. If a designer is without a clear vision of what is to be accomplished by a given product at the projects inception it is almost certain the outcome will not be as effective as it could/should be. The application solve the problem of designers designing for designers, and help focus the creative effort on the true communication objectives of the client.

Parallel applications presently exist commercially that enable the user to develop a business plan, brainstorm creative concepts, and schedule a project. In order BizPlanbuilder, IdeaFisher, and MacProject, provide a context in which Design Planner© will exist, that of interactive project planning supplements.
Design Planner

Context

Design Planner exists in the context of other interactive applications designed to assist users within a given area of specialty. Similar commercial applications include: Biz Plan Builder, Idea Fisher, and MacProject.

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The application itself is part of a much broader context, that of project planning, management, and evaluation activities. The diagram at left illustrates the a total systems plan adapted to The Creative Process, of which design planner is a product. Design Planner® is the result of a synthesis of the most appropriate processes in the total plan applied to the creative process.

Design Planner® is a powerful tool that has the power to function on two levels. It first functions as a teaching device by providing instruction about
Table of Contents

Preface 1
Table of Contents 3
Hypercard Basics 5
Design Planner Context 7

Introduction to Design Planner 1
Mission Statement 3
Examples

Goals 5
Examples

Objectives 7
Examples

Indicators of Success 9
Example

Processes and Strategies of Implementation 11
Examples

Print / Save Proposal 13
Examples

Reference 15
Bibliography
Credits
Hypercard Basics

The Hypercard® interface developed by Apple Computer Inc. utilizes a metaphorical approach to the organization and transformation of information. The metaphor is a note ‘card’, and each completed project is termed a ‘stack’ referring to a pile of note cards.

Hypercard developmental tool for designers of interactive interfaces, as well as a tool for everyday system improvements, scheduling, etc. Hypercard allows the user to control the way in which information is accessed.

The concept of user driven information is called interactivity, the user is physically interacting with the information by clicking on buttons that control navigation. By using the mouse to point and click on buttons appearing on the screen the user can control movement throughout any Hypercard application. Buttons may be indicated by a border outline of many different sizes and shapes, can be named with text, and can also carry an easily identifiable icon, such as a forward arrow meaning ‘go to the next card in the stack’.

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Within every interactive interface the need arises to provide a visual context detailing all of the information within an application. Due to the ‘interactive’ nature of Hypercard applications users will move freely through the information, accessing what is most important at a given time. However at another time the user may wish to tap into a different part of an applications’ functionality, thus the need to provide a layout of the application and all its components. This is done in the form of an informational chart designed to illustrate each area in the application, and its relation to the whole. This need is satisfied by the ‘Map’ in the Design Planner® Application.
Design Planner

Write a Timeline

Write a Budget
Table of Contents

PART I

Preface 1
Table of Contents 3
Hypercard Basics 5
Design Planner Context 7
Creative Planning Process Diagram

PART II

Introduction to Design Planners
Design Planner Process Diagram
Navigator Map
Mission Statement
Example Cards
Goals
Example Cards
Objectives
Example Cards
Indicators of Success
Example Cards
Processes and Strategies of Implementation
Example Cards
Print / Save Proposal
Example Cards

REFERENCE
Bibliography
Credits
# Table of Contents

**PART I**
- Preface ........................................ 2
- Table of Contents ................................ 4
- Hypercard Basics ................................ 6
- Design Planner Context .......................... 8
    Creative Planning Process Diagram

**PART II**
- Introduction to Design Planner - ............. 12
  Design Planner Process Diagram
  Navigator Map
- Mission Statement ................................ 14
  Example Cards
- Goals .............................................. 16
  Example Cards
- Objectives ........................................ 18
  Example Cards
- Indicators of Success ............................ 20
  Example Cards
- Processes and Strategies of Implementation ...
  Example Cards
- Print / Save Proposal ............................ 24
  Example Cards

**REFERENCE**
- Bibliography .................................... 26
- Credits .......................................... 32
Introduction to
Design Planner

On certain cards the buttons in the main navigational area will vary from the standard five listed above. An introduction to buttons you will see from time to time is included below.

*EDIT* will take you directly to the card where you enter text (within each area) ex: click "edit" when in the "Objectives" stack to go to the "Write Objectives" card. This button is most useful when re-entering the application to make changes to your proposal.

*EXAMPLE* will allow you to see an example of the subject currently being addressed. ie: clicking on 'example' while working in "Goals" will show you an example goal.

*PRINT* the print button will bring you to the print stack, allowing you to title your proposal and print a copy of your document, or save a copy of your proposal as a Hypercard stack or as a word processing document for later use.

*PRINT NOTES/FIELD* will allow you to print a copy of the card you are currently on, (or in cases of long fields unable to be seen on the screen 'print field' will produce for you a copy of the text in its entirety) Use this function to print certain cards you may wish to have with you away from the computer interface to use as worksheets when developing your proposal.

*SAVE A COPY* allows you to save a copy of your proposal as a Hypercard stack, or as a word processing document without quitting afterward.

Upon entering the main portion of the application you will notice a new group of buttons appear directly under this field. The new buttons will allow you to move freely between the different components within the application. After having reviewed the information key to each component of a successful project proposal you will be asked to enter text relevant to the particular area in which you are working. Design Planner will format your text into a proposal format you may then print out. The cards on which you will need to be 'active', or enter text will be highlighted accordingly.

The area to the left of the vertical rule next to this field has been reserved as an area designated to provide helpful hints, reminders, reviews, or summaries of key material.
Mission Statement

The first step in the proposal development process is to develop a Mission Statement for the project. The ideal project mission statement will address the following issues: Who, What, Where, When, How, and Why. Who is the target audience, What will your project do, When will the project be complete, Where will the project be implemented, Why are you proposing the project, How are you going to accomplish the projects' goals and objectives?

The application will assist you in completing this task by providing reference as to how to go about accomplishing the aforementioned. By stepping through the information you will learn how to analyze the problem, be advised of several issues that may have relevance in regard to your creative task, and understand how to determine priorities. A useful exercise to perform at the outset of a project is to write a list of preliminary design criteria while your first impression of the task at hand remains fresh in your mind. Design Planner allows you to enter your information directly within application (top left), to be used later when specifying final design criteria used to develop goals.

Upon completion of the text regarding a mission statement Design Planner will provide a field in which you can write your project Mission Statement (lower left). A template structure will be provided for you at this time to help you formulate your thoughts into an effective mission. Also, you will have the option of seeing an example mission statement for further assistance, printing a copy of the screen to use as a notetaking device away from the computer, or printing only one field. The examples included are both metaphorical and literal. The metaphorical elaborates on the brick metaphor utilized throughout the application, while the literal is an excerpt from the original Design Planner proposal.
Preface

System Requirements:
Hardware
Macintosh computer system, compatible monitor.

Software
Hypercard 2.0, Design Plannere.

Release information:
Design Plannere is copyright 1992, Roy Prochaska Jr., and not available for commercial reproduction as of yet. Permission for use has been granted to the Department of Graphic Design and the Media Resource Center At Rochester Institute of Technology. For information regarding obtaining the software contact: R. Prochaska Jr. 8730 Nashville, Oak Lawn IL, 60453
Table of Contents

PART I
Preface 2
Table of Contents 4
Hypercard Basics 6
Design Planner Context 8

PART II
Introduction to Design Planner 12
Creative Planning Process Diagram
Design Planner Process Diagram
Navigator Map
Mission Statement
Example Cards
Goals
Example Cards
Objectives
Example Cards
Indicators of Success
Example Cards
Processes and Strategies of Implementation
Example Cards
Print / Save Proposal
Example Cards

REFERENCE
Bibliography
Credits
Hypercard Basics

The HyperCard interface developed by Apple Computer Inc. utilizes a metaphorical approach to the organization and translation of information. The metaphor is a note 'card', and each completed project is termed a 'stack' referring to a pile of note cards.

HyperCard is developmental tool for authors of interactive interfaces, as well as a tool for everyday system improvements, scheduling, etc. HyperCard is powerful in that it allows the user to control the way in which information is accessed.

The concept of user driven information is called interactivity, the user is physically interacting with the information by clicking on buttons that control navigation. By using the mouse to point and click on buttons appearing on the screen the user can control movement throughout any HyperCard application. Buttons may be indicated by a border outline of many different sizes and shapes, can be named with text, and can also carry an easily identifiable icon, such as a forward arrow meaning 'go to the next card in the stack'.

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As mentioned earlier HyperCard projects are called 'stacks'. A stack can function by itself, moving only to cards in itself, or may also work with separate stacks, and their respective cards. Many applications developed in HyperCard are actually multiple 'stacks' working together when necessary. This is the case with Design Planner. The application consists of eight unique stacks that work together based on user input. When starting the application the user should double-click the mouse on either the 'dp intro', or 'teaser' stack.

Within every interactive interface the need arises to provide a visual context detailing all of the information within an application. Due to the 'interactive' nature of HyperCard applications users will move freely through the information, accessing what is most important at a given time. However at another time the user may wish to tap-in to a different part of an application's functionality, thus the need to provide an illustration of the application with all its components. This is done in the form of an informational chart designed to illustrate each area in the application, and its relation to the whole. This need is satisfied by the "Design Planner Map."
Design Planners
Context

Design Planners® exists in the context of other interactive applications designed to assist users within a given area of specialty. Similar commercial applications include; Biz Plan Builder, Idea Fisher, and MacProject.

Design Planners® was developed to assist users in developing and articulating an effective creative process. After using the application, designers will have written a project proposal that can be used in client interaction, and as a personal creative problem solving tool. The completed proposal will include: Mission Statement, Goals, Objectives, Indicators of Success, and Processes and Strategies of Implementation.

In the process of writing the proposal users will learn about the creative process and develop a systematic problem solving approach to the creative process. By articulating a proposal, designers will also provide a standard against which to evaluate their work in terms of its effectiveness at meeting the projects original communication objectives. If used properly Design Planners® is a very powerful tool, and will help greatly to ensure each creative endeavor is answered with an effective visual solution. The proposal also provides a necessary project planning and management function.

Prior to the development of this application, there was no tool designers could utilize to assist in the design process, and ensure clearly defined objectives were successfully achieved within each assignment. Without considering the original communication objectives of a project it is impossible to measure the outcomes' true success, thus the creative effort is devalued, and perhaps not appropriate.

Design Planners® will go a long way toward making sure the creative effort is focused on the correct target, and that the product does in fact achieve critical communication objectives.

The ultimate purpose of Design Planners® is to improve the quality of graphic communications. It does so by providing users with a format in which they are continuously reminded of critical design planning and management issues, as well as their own projects' objectives.

The application itself is part of a much broader context, that of project planning, management, and evaluation activities. The diagram at left illustrates the a total systems plan adapted to The Creative Process, and how a design planner is a product. Design Planners® are the result of the synthesis of the most important processes in the total plan applied to the creative process.
Design Planner Process Diagram
# Table of Contents

**PART I**
- Preface
- Table of Contents
- Hypercard Basics
- Design Planner: Context

**PART II**
- Introduction to Design Planner
- Creative Planning Process Diagram
- Design Planner Process Diagram
- Navigator Map
- Mission Statement
- Specifying preliminary design criteria
- Writing a Mission Statement
- Goals
- Specifying final design criteria
- Writing Goals
- Objectives
- Action verb index
- Writing Objectives
- Indicators of Success
- Writing success indicators
- Processes and Strategies of Implementation
- General process and strategy
- Timeline
- Budget
- Print / Save Proposal
- Title the proposal
- Save, quit

**REFERENCE**
- Bibliography
Hypercard Basics

The Hypercard interface developed by Apple Computer Inc. utilizes a metaphorical approach to the organization and translation of information. The metaphor is a 'note card', and each completed project is termed a 'stack' referring to a pile of note cards.

Hypercard is a developmental tool for authors of interactive interfaces, as well as a tool for everyday system improvements, scheduling, etc. Hypercard is very powerful in that it allows the designer to control the way the user interacts with information.

The concept of user driven information is called interactivity, the user is physically interacting with the information by clicking on buttons that control navigation. By using the mouse to point and click on buttons appearing on the screen the user can control movement throughout any Hypercard application. Buttons may be indicated by a border outline of many different sizes and shapes, can be labeled with text, and can also carry an easily identifiable icon, such as a forward arrow meaning 'go to the next card in the stack'.

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As mentioned earlier Hypercard projects are called 'stacks'. A stack can function by itself, moving only to cards in itself or may also work with separate stacks, and their respective cards. Many applications developed in Hypercard are actually multiple 'stacks' working together when necessary. This is the case with Design Planner Map. This application consists of eight unique stacks that work together based on user input. When starting the application the 1st time user should double-click the mouse on either the 'dp intro', or 'teaser' stack.

Within every interactive interface the need arises to provide a visual context depicting the structure of the information within the application. Due to the 'interactive' nature of Hypercard applications, users can move freely through the information, accessing what is most important at a given time. In order to deter the user from losing touch with where he/she is within the application it is necessary to include a navigational tool. This need is satisfied by the 'Design Planner Map'.

The user also has many choices as far as interaction...

This details should be provided.

Too small
Design Planner®
Context

Design Planner® belongs within the context of other interactive applications designed to assist users within a given area of specialty. Similar commercial applications include: Biz Plan Builder, Idea Fisher, and MacProject.

Design Planner® was developed to assist users in developing and articulating an effective creative process. After using the application designers will have produced a project proposal that can be used in client interaction, and as a personal creative problem solving tool. The completed proposal will include: Mission Statement, Goals, Objectives, Indicators of Success, and Processes and Strategies of Implementation.

In the process of writing the proposal users will learn about the creative process and develop a systematic problem solving approach to the creative process. By evaluating a proposal designers will also provide a standard against which to evaluate their work in terms of its effectiveness at meeting the projects original communication objectives. If used properly Design Planner® is a very powerful tool, and will help greatly to ensure each creative endeavor is answered with an effective visual solution.

Design Planner® will assist users in developing a project proposal that will define the specific objectives of the project. Without considering the original communication objectives of a task it is impossible to measure the success of creative tasks, as the creative effort is devalued, and perhaps not appropriate. Design Planner® will help continuously remind the user that the product does in fact achieve critical communication objectives.

The ultimate purpose of Design Planner® is to improve the quality of graphic communications. It does so by providing users with a format in which they are continuously reminded of critical design planning and management issues, as well as their own projects' objectives.

Design Planner® is a powerful tool that has the power to function on two levels. It first functions as a teaching device by providing instruction about the process of writing a successful project proposal. Secondly, it functions as a production tool for the more experienced user. By using the interface the user can be continually reminded of key factors relating to the assignment at hand as well as produce the proposal in the same application, thus improving the final solution as well as saving time. By providing a user friendly and highly informative interface Design Planner® will help to improve the quality of visual communications by streamlining an often
Mission Statement

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The application will assist you in completing this task by providing reference as to how to go about accomplishing the aforementioned. By stepping through the information provided about how to write a mission statement you will learn how to analyze a problem, be advised of several issues that may have relevance in regard to your creative task, and understand how to determine priorities. A useful exercise to perform at the outset of a project is to develop a listing of preliminary design criteria after discussing the problem with the client, and while your first impression of the task at hand remains fresh in your mind. Design Planner allows you to enter your information directly within application (top left), to be used later when specifying final design criteria used to develop goals.

Upon completion of the text regarding a mission statement Design Planner will provide a field in which you can write your project Mission Statement (lower left). A template structure will be provided for you at this time to help you formulate your thoughts into an effective mission. Also, you will have the option of seeing an example mission statement for further assistance, printing a copy of the screen to use as a notetaking device away from the computer, or printing only the field. The examples included are both metaphorical and literal. The metaphorical elaborates on the brick metaphor utilized throughout the application, while the literal is an excerpt from the original Design Planner proposal.
Goals

Project Goals support the mission statement. After you have written your mission statement Design Planner will ask you to move on and write your Goals. As in the mission stack you will first be provided with information regarding how to write effective project goals.

As you learn about the importance of project Goals you will be instructed in the importance of a hierarchy of goals, the purpose of a utopian vision, how goals relate to objectives, and finally how to articulate your own project goals.

Once you have received your instruction you will need to write your final design criteria, that will then assist you in writing your objectives. Your preliminary criteria will be provided for reference at this time. (top left)

You will write your Goals in relation to your Final Design Criteria. Be certain to satisfy each of your criteria with a goal statement. This will ensure that you are writing goals to accomplish each of the criteria you have deemed important to a successful solution. Again, as in the mission statement, you will be provided with a template structure to refer to, along with examples, and the ability to print notes, etc. (lower left)
Objectives

After completing the goals section of the application you will have written a mission statement and relevant goals for your project. In doing so you will have defined the problem, accepted the task, become aware of possible constraints, and formed a vision of what a successful solution might be. Furthermore you will have specified design criteria for the project in the form of goals. Achieving each goal will guarantee that your creative solution meets the clients needs.

The process of writing Objectives will help you to articulate the specific effect your solution will have upon the target audience. Objectives should be written to achieve the desired state defined in each of your project goals. An objective is a description of a performance or action you want the audience to able to demonstrate before being considered competent. A objective describes an intended result of a process undertaken. "Objectives are useful tools in the creation, implementation, and evaluation of a design solution. They point to the content and procedures that will lead to successful design, in helping to manage the design process itself, and in helping to prepare the means of determining whether or not the solution is successful in terms of the communication needs that facilitated the work to begin with."

Design Planner will help you to write useful objectives by providing you with a brief education about the purpose and benefits, qualities, and importance of project objectives. You will be instructed in each of the major components of an effective objective: performance, conditions, and criteria.

As was the case in the two previous sections you will be afforded the opportunity to write your objectives within the application. In addition to seeing an example, reviewing the instruction by clicking 'help', or printing notes of a specific field, you will also have access to a listing of 'action verbs'. The scrolling field to the left of the card will assist you in articulating your objectives as specifically as possible. Also provided for reference are your project Goals. Remember to define objectives for each of your goals.
Preface

System Requirements:

Hardware
Macintosh computer workstation, compatible monitor.

Software
HyperCard 2.0, Design Planner.

Release information:
Design Planner, copyright 1992, Roy Prochaska Jr., and is not available for commercial distribution.
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# Table of Contents

## PART I
- Preface .................................................................................................................. 2
- Table of Contents .................................................................................................... 4
- HyperCard Basics .................................................................................................... 5
- Design Planner Context .......................................................................................... 6

## PART II
- Introduction to Design Planner ................................................................................ 8
- Creative Planning Process Diagram ......................................................................... 8
- Design Planner Process Diagram .............................................................................
- Navigator Map ........................................................................................................
- Mission Statement .................................................................................................. 12
  - Specify Preliminary Design Criteria ....................................................................
  - Write a Mission Statement ...................................................................................
- Goals ....................................................................................................................... 14
  - Specify Final Design Criteria ..............................................................................
  - Write Goals .........................................................................................................
- Objectives ................................................................................................................ 16
  - Action Verb Index ................................................................................................
  - Write Objectives ...................................................................................................
- Indicators of Success ............................................................................................... 18
  - Write Indicators of Success ................................................................................
- Processes and Strategies of Implementation .......................................................... 20
  - General Process and Strategy .............................................................................
  - Timeline ..............................................................................................................
  - Budget .................................................................................................................
- Print / Save Proposal ............................................................................................... 22
  - Add a Title to a Proposal .....................................................................................
  - Print / Save / Quit ............................................................................................... 

## REFERENCE
- Bibliography ........................................................................................................... 23
HyperCard Basics

The HyperCard interface developed by Apple Computer Inc. utilizes a metaphorical approach to the organization and translation of information. The metaphor is a note ‘card’, and each completed project is termed a ‘stack’ referring to a pile of note cards.

HyperCard is a developmental tool for authors of interactive media applications as well as a tool for everyday system improvements, scheduling, etc. HyperCard is very powerful in that it allows the designer to control the way the user interacts with information, providing many choices for the user.

The concept of a user-driven interface is called “interactivity”, the user is physically interacting with the information by clicking on buttons that control navigation. By using the mouse to point and click on buttons appearing on the screen the user can control movement throughout any HyperCard application. Buttons may be indicated by border outlines of many different sizes and shapes, can be labeled with text, and can also carry an easily identifiable icon, such as a forward arrow meaning ‘go to the next card in the stack’.

HyperCard provides a position for textual information in areas called ‘fields’. Fields exist on cards and contain relevant verbal information. When you are asked ‘Print a field?’, for example, HyperCard is actually asking you to choose one of many fields that you would like to have as hard copy.

As mentioned earlier HyperCard projects are called ‘stacks’. A stack can function by itself, moving only to cards in itself, or may also work with separate stacks, and their respective cards. Many applications developed in HyperCard are actually multiple ‘stacks’ working together when necessary. Design Planner operates in this manner. This application consists of eight unique stacks that work together based on user input. When starting the application the 1st time user should double-click the mouse on either the ‘dp intro’, or ‘teaser’ stack.

Within every interactive interface a visual context should be provided. This details the structure of the information within the application. Due to the ‘interactive’ nature of a HyperCard application users can move freely through the information, accessing what is most important at any given time. To ensure that the user does not lose touch with their location within the application it is necessary to include a navigational tool. This need is satisfied in Design Planner by the “Design Planner Map”
Design Planner

Context

Design Planner belongs within the context of other interactive applications designed to assist users within a given area of specialty. Similar commercial applications include; Biz Plan Builder (a business plan developmental tool), Idea Fisher (a creative brainstorming application), and MacProject (a project scheduling tool).

Design Planner was developed to assist users in developing and articulating an effective creative problem-solving process. After using the application designers will have produced a project proposal that can be used in client interaction, and as a problem solving tool. The completed proposal will include: Mission Statement, Goals, Objectives, Indicators of Success, and Processes and Strategies of Implementation.

In the process of writing a project proposal users will develop a systematic problem solving approach to the creative process. Designers will also provide a standard against which to evaluate their work in terms of its effectiveness at meeting the projects original communication objectives. If used properly Design Planner is a very effective evaluation tool, and will help greatly to ensure each creative endeavor is answered with an appropriate visual solution.

Design Planner will assist users in developing a project proposal that defines the specific objectives of a project. Without considering the original communication objectives of a task it is impossible to measure true success. Therefore the creative effort is devalued, and perhaps not appropriate. Design Planner will provide support in order to make sure the creative effort is focused on the correct target. In this way Design Planner ensures the product does achieve critical communication objectives.

Design Planner also has the ability to function on two levels. First, if functions as a teaching device by providing instruction in the process of writing a successful project proposal. Secondly, it functions as a production tool for the more experienced user. By using the interface the user can be continually reminded of key factors relating to the assignment at hand as well as produce the proposal simultaneously, thus improving the final solution as well as saving time. By providing a user friendly and highly informative interface Design Planner will help to improve the quality of visual communications by streamlining an often neglected exercise in the creative process, that of planning and goal setting. If a designer is without a clear vision of what is to be accomplished by a given product at the project’s inception it is almost certain the outcome will not be as effective as it could/should be.
The Creative Planning Process

Design Planner Process Diagram.

The Design Planner Process

Design Planner Process Diagram.
Introduction to Design Planner®

This application will help you to formulate and articulate your design process in a problem solving approach through a series of steps. After using Design Planner you can expect to have written a project proposal that will include: a project Mission Statement, Goals, Objectives, Indicators of Success, and Processes and Strategies of Implementation.

The primary focus of Design Planner is to help in writing an effective project proposal plan, that, if adhered to, will ensure a project’s success in terms of its true communication objectives. Keep in mind that the project has only just begun at the time the proposal has been fully articulated, and the proposal should be referred to throughout the creative process and can be revised if necessary.

The diagram at top left is a visual representation of the Creative Planning Process and is designed to demonstrate the different components of a successful project management plan. The Design Planner application should be seen in context with the total process. It is the product of a synthesis of the many different activities conducted within each phase of the Creative Planning Process.

The Design Planner Process Diagram at lower left is a visual representation of the dynamic project planning process adopted by the application. The user first writes a mission statement. Goals are then articulated to achieve the mission. Objectives are formulated to satisfy each goal. Indicators of Success are necessary in order to measure success in terms of the original objectives. Lastly the user defines the process by which all of the above will be achieved, including developing a timeline, a budget, and a process of implementation.

A description of how to navigate through the application is provided below. Each title refers to the name of a button within the application, and then explains the result of clicking on that particular button.

MAP - will bring you to the main navigational map (illustrating all of Design Planners’ components), and allow you to navigate throughout the application.

BACKWARD ARROW - will allow you to move backward to the card preceding the one you are currently on.

FORWARD ARROW - will allow you to move forward to the next card.

QUIT - allows you to quickly exit Design Planner, and HyperCard.

RETURN - allows you to return to the card from which you came.
On certain cards the buttons in the main navigational area will vary from the standard five listed previously. An introduction to buttons you will see in special situations has been provided below.

**EDIT** - will take you directly to the card where you enter text (within each area) ex: click "edit" when in the "Objectives" stack to go to the "Write Objectives" card. This button is most useful when re-entering the application to make changes to your proposal.

**EXAMPLE** - will allow you to see an example of the subject currently being addressed. ie: clicking on 'example' while working in "Goals" will show you an example of a goal.

**PRINT** - will bring you to the print stack, allowing you to title your proposal and print a copy of your document, or save a copy of your proposal as a HyperCard stack or as a word processing document.

**PRINT NOTES/FIELD** - will allow you to print a copy of the card you are currently on, (or in cases of long fields unable to be seen on the screen 'print field' will produce for you a copy of the text in its entirety) Use this function to print certain cards or fields you may wish to have to use as worksheets when developing your proposal.

**SAVE A COPY** - allows you to retain a copy of your proposal as a HyperCard stack, or as a word processing document.

After entering the main portion of the application you will notice a new group of buttons appear under the central text field, at the bottom of the screen. The five buttons will allow you to move freely between the five major components of in the application.

The field at left is the "Map", and functions as the main navigational tool. At any time you may refer to it, and use it to go directly to any area within the application. First time users of the application should take the time to read the information in each area, and begin at the "Mission Statement." Upon completion of your proposal you may save it for later reference, and print a copy for your own personal use, or for a client.
Specify Preliminary Design Criteria.

Write a Mission Statement.

A Mission Statement is a very general, brief statement of intent. It should not exclude any possible outcome of the project, and be in the broadest of terms. Allowing for multiple interpretations is appropriate at this stage of the project. By filling in the blanks of the following statement you will develop an effective Mission:

"An __________ is a __________ that will __________ to this end __________.

Mission Statement

Map | ← | → | Quit | Return | Print

Design Planner

Specify Preliminary Design Criteria

The purpose of specifying "design criteria" is to assist in the development of relevant project goals. After your initial client meeting you should be able to determine what some project criteria may be. Keep in mind that the problem to be solved through your efforts, the constraints already defined, the client's expectations of your performance, as well as anything else relevant to this particular assignment.

Preliminary Design Criteria

Print notes

Print a field

Mission Goals Objectives Success Indicators Processes & Strategies
Mission Statement

The first step in the proposal development process is to write a Mission Statement for the project. The ideal project mission statement will address the following issues: Who, What, Where, When, How, and Why? Who is the target audience? What will your project do? When will the project be complete? Where will the project be implemented? Why are you proposing the project? How are you going to accomplish the projects' goals and objectives?

The application will assist you in completing this task by providing reference as to how to go about accomplishing the aforementioned. By stepping through the information provided about how to write a mission statement you will learn how to analyze a problem, be advised of several issues that may have relevance in regard to your creative task, and understand how to determine priorities. A useful exercise to perform at the outset of a project is to develop a listing of preliminary design criteria after discussing the problem with the client, and while your first impression of the task at hand remains fresh in your mind. Design Planner allows you to enter your information directly within the application (top left), to be used later when specifying final design criteria used to develop goals.

Upon completion of the text regarding a mission statement Design Planner will provide a field in which you can write your project Mission Statement (lower left). A template structure will be provided for you at this time to help you formulate your thoughts into an effective mission. Also, you will have the option of seeing 1) an example mission statement for further assistance, 2) printing a copy of the screen to use as a notetaking device away from the computer, or 3) printing a single field. The examples included are both metaphorical and literal. The latter elaborates on the brick metaphor utilized throughout the application, while the former is an excerpt from the original Design Planner proposal.
In the previous section you were asked to develop a list of Preliminary Design Criteria. The purpose of doing so was to get you thinking about your project's goals at a very early stage. As you can see, your original design criteria have been provided here for reference when specifying your Final Design Criteria. Your final criteria will be useful in writing Goals by helping you to specify in terms of goals each of your important design criteria.

Specify Final Design Criteria.

Write Goals.
Goals

Project Goals support the mission statement. After you have written your mission statement Design Planner will ask you to move on and write your Goals. As in the mission stack you will first be provided with information regarding how to write effective project goals.

As you learn about the importance of project goals you will be instructed in the organization of a hierarchy of goals, the purpose of a utopian vision, how goals relate to objectives, and finally how to articulate your own project goals.

Once you have received your instruction you will write your final design criteria, that will then assist you in writing your objectives. The preliminary criteria you have established will be provided again for reference at this time. (top left)

Goals will be written in relation to your final design criteria. Be certain to satisfy each of your criteria with a goal statement. This will ensure that you are writing goals to accomplish each of the criteria you have deemed important to a successful solution. Again, as in the mission statement, you will be provided with a template structure to refer to, along with examples, and the ability to print notes, etc. (lower left)
### Action verbs

- to alter
- to arrange
- to bleed
- to build
- to calculate
- to captivate
- to carve
- to chart
- to circle
- to cite
- to combine
- to compare
- to compose
- to complete
- to compute
- to construct
- to contract
- to conduct
- to contradict

### Write project Objectives

Accurate Objectives that specify each of the goals, more than one objective for each goal is often necessary. The following template may be useful.

In order to demonstrate achievement of Goal ___, the outcome must ___, under the following conditions: ___ and ___.

#### Objectives

<table>
<thead>
<tr>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

#### Objectives

<table>
<thead>
<tr>
<th>Mission</th>
<th>Goals</th>
<th>Objectives</th>
<th>Success Indicators</th>
<th>Processes &amp; Strategies</th>
</tr>
</thead>
</table>

Write Objectives.
Objectives

So far you have written a mission statement and relevant goals for your project. In doing so you will have defined the problem, accepted the task, become aware of possible constraints, and formed a vision of what a successful solution might be. Furthermore you will have specified design criteria for the project in the form of goals. Achieving each goal will guarantee that your creative solution meets the clients needs.

The process of writing objectives will help you to articulate the specific effect your solution will have upon the target audience. Objectives should be written to achieve the desired state defined in each of your project goals. An objective is a description of a performance or action you want the audience to demonstrate before being considered competent. It describes an intended result of a process undertaken. Objectives are useful tools in the creation, implementation, and evaluation of a design solution. They point to the content and procedures that will lead to successful design, in helping to manage the design process itself, and in helping to prepare the means of determining whether or not the solution is successful in terms of the communication needs that facilitated the work to begin with.

Design Planner will help you by providing a brief education about the purpose and benefits, qualities, and importance of project objectives. You will be instructed in each of the major components of an effective objective: performance, conditions, and criteria.

As was the case in the two previous sections you will be afforded the opportunity to write your objectives within the application. In addition to seeing an example, reviewing the instruction by clicking 'help', or printing notes of a specific field, you will also have access to a listing of 'action verbs'. The scrolling field to the left of the card will assist you in articulating your objectives as specifically as possible. Also provided for reference are your project Goals. Remember to define objectives for each of your goals.
Summary
The measure of achievement must be related to a starting point, your objective. Furthermore an objective must be seen in contrast with the existing pre-condition in order for its true effectiveness to be measured.

Without comparison to the state of the area before your project, it is impossible to determine if anything has been achieved.

Write Indicators of Success

At least one "Indicator of Success" should be listed for each objective. The ideal success indicator will communicate what level of accomplishment must be demonstrated by the audience in order to consider a given objective achieved.

Objectives

Indicators of Success

Write Indicators of Success.
Indicators of Success

Indicators of Success are the method by which you will define standards to be used in evaluating the effectiveness of your creative solution. This step is an integral part of any planning management process. Without comparison to the state of the issue before the project, it is impossible to determine if anything has been achieved, quantitatively or qualitatively. Evaluation will lend credibility to your efforts by providing a forum in which to illustrate why your solution is appropriate, effective, and successful. Success indicators can be used to measure the project’s outcome against the previous condition (summative evaluation), or used to monitor progress during the design process (formative evaluation).

Design Planner will provide you with information about the process of specifying Indicators of Success, their use, and further insight as to why they are a necessary component of any project proposal. You will also receive instruction as to how to maximize the benefits of writing success indicators.

The application will provide an area for you to write your Indicators of Success. Remember that the purpose of this step is to articulate what level of comprehension must be demonstrated by your target audience for you to consider each objective successfully achieved. Remember to define indicators of success for each objective.
Write a Timeline.

Write a Budget.
Processes and Strategies of Implementation

The last component of the proposal assists you in generating a Process and Strategy of Implementation that consists of three parts: a Timeline (at left), a Budget (at lower left) and a General Process and Strategy (below). This area is more open to interpretation than were the mission, goals, objectives, and indicators of success. Each of the components of your Process and Strategy of Implementation can be addressed very specifically, or on a much broader scale. The importance lies in developing a general process, a budget, and a timeline tailored to your given project.

Instruction is provided about the process of developing a timeline, and a listing of possible related factors is included to remind you of key milestones in the development of your project. Similar instruction and reminders are provided in relation to your General Process and Strategy, and Budget. The illustrations at left and below reference the areas in which you will perform each of the above mentioned tasks.

Design Planner

Remember:
The key to developing a successful "Process and Strategy of Implementation," is to explicitly state for both yourself, your staff, and the client, how you plan to achieve the results set forth in your "Goal" and "Objective" statements.

Write your general Process & Strategy

Process & Strategy of Implementation

Mission Goals Objectives Success Indicators Processes & Strategies

Print notes Print a grid

Develop a General Processes and Strategy.
Add an Appropriate Title.

Make Final Revisions, Print, Save.
After having completed the process of writing your proposal, or any time you would like to save your work for later use, or quit the application, you will be brought to the Print stack. This stack consists of two cards, a titling card (upper left), and card on which you can view the completed proposal. The title card (lower left) allows you to enter the appropriate heading to your proposal. The next card will allow you to view your proposal in its entirety. You will see that the information you had entered in each of the previous sections of the application has been returned for you. At this time you can make any final refinements you deem necessary, or make typographic adjustments to your proposal by using the pull-down HyperCard menus. You can also save your proposal as a HyperCard stack (which will consist of the two cards in the current stack with your information retained), or as a text file for use in a standard word-processing application. Another option provided is the ability to print the proposal from within HyperCard.
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Nadin, Dr. Mihai & Ockerse, Thomas. Interpretant Matrix. 1990.


Appendix 12

Design Planner® Software