MUSEUMS etc

Advanced Interpretive Planning

Essential concepts and strategies for today's interpretive planners.

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Advanced Interpretive Master Planning

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Chapter 1 - A quick review of interpretive basics – When is “interpretation” NOT “interpretation"?

This question came up a short time ago regarding “interpretive” panels from a discussion on *LinkedIn*. My response was that most interpretive panels I have seen were not “interpretive” panels at all…. *But “informational”, educational, or lots of words, pictures-graphics-and text within a usually square box stuck on a stick panels.*

But they were NOT interpretive. Why not? Because the main guiding principles of interpretation were not used in the development of the panels. They were made to look “attractive”, but missed the actual successful delivery (interpretation) of the message. So here is my rant – what makes interpretation “interpretive”? My biggest issue is with “interpretive” designers or consultants who have never had any actual training at all in interpretation – yet design “interpretive” stuff, not knowing what the key principles of interpretive design actually are. Sort of like saying you’re a doctor even thought you have never been to medical school. So we get a lot of interpretation that “isn’t”!

First – the definition of interpretation:

“*Interpretation is a communication process designed to REVEAL meanings and relationships of our natural and cultural heritage to the public, through firsthand experiences and involvement with objects, artifacts, landscapes, programs, services, media or sites.*
”Interpretation Canada 1976 modified by JVA 2012.

“**Interpreters do translate, but we translate from the technical languages of the experts into the language of every-day people**.” *J. Veverka – The language of Live Interpretation.*

So what makes the message interpretive anyway? Well based on what I was taught in my interpretive courses in college, and reading research in the *Journal of Interpretation*, and conducting my own research programs and evaluations into interpretive communications, here are the guidelines that I teach in my interpretation courses and we use in producing our interpretive products:

1. Interpretive messages are based in their formatting and design from Tilden's Interpretive Principles in that, the interpretive message (text, graphics, design) should:

   a. **Provoke** the attention, curiosity and interest of the visitor/audience.
   b. **Relate** to the everyday lives of the visitors.
   c. **Reveal** the main point of the message in imaginative and creative ways.
   d. **Address the Whole** – have the interpretation help to illustrate the main interpretive theme of the site.
   e. **Strive for Message Unity** – in design, use of graphics, colors, fonts, etc. The message presentation must "fit in" to the story it is helping to illustrate.

2. Interpretive messages/media are outcome based. That is that all interpretation panels, for this example, are written and designed to accomplish:

   a. Learning Objectives
   b. Behavioral Objectives.
   c. Emotional Objectives.

These are "outcomes" that the site is paying to have the panel (or any interpretation) accomplish, the benefits of the panel(s) in this case. I believe that for every $1.00 spent on interpretation the site/management should want to expect at least $2.00 in some benefits (return on their interpretive investment) from those panels.

The two questions everyone hates:

When we plan interpretive panels, or any interpretive media, the two questions I always ask are:

1.Why would a visitor want to know this?

2. How do you want the visitor to USE the interpretation/message you are giving them?

These go back to your objectives – you can have objectives, but are they "good ones"? Here you can check marketability of your outcomes.

3. Interpretive messages/design takes into account that visitors remember:

   a. 10% of what they hear (audio messages).
   b. 30% of what they read (keep text short and powerful – theme based).
   c. 50% of what they see (be sure the graphics help illustrate the main interpretive theme). Remember, a picture can be worth 1000 words, but they can be the *wrong* 1000 words.
   d. 90% of what they do. Good interpretive panels have visitors "look for", "find the…", "smell the…", "touch the…", or some other action or activity.

   The activity is where most of the long term memory from the interpretive experience will be lodged. *From Bill Lewis – Interpreting for Park Visitors.*

4. Interpretive design standards tell us some of these basic (from interpretive research over many years) development considerations:

a. Interpretive panels, exhibits, etc. should have a “provocative” header or Graphic (or both) to attract attention – a question or statement, whose answer will be “revealed” or illustrated by the end of the panel text, exhibit or other media presentation.

b. Interpretive panels, in this case, should not have more than about **100 words of text** written in at least **30 point size** for the main text (see panel example below).

c. If you can’t get your main message across in about 15 second you probably aren’t going to. Think of 15 second commercials…!

d. All interpretive panels at any site or location should illustrate the same interpretive theme for the total site interpretation, just through different examples or illustrations.

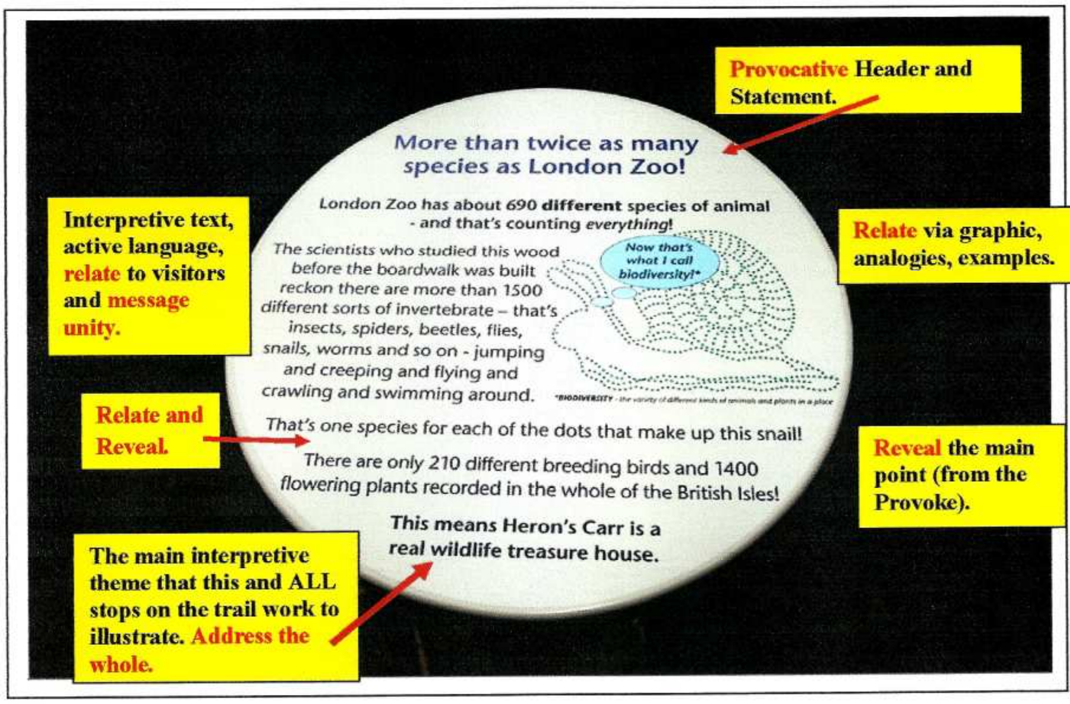
e. Visitors don’t really care what the interpretive panels are made out off, or its shape. The key factor is “did the message presentation/illustration “connect” with the visitor’s imagination, feelings, heart or personality?

Will the message being interpreted be REMEMBERD or acted on? But creative panel physical shapes can help with provocation (to approach, look at or interact with the panel), or contribute to “message unity” for the total site interpretation. Does the panel fit into the landscape or its setting visually and thematically?

5. Interpretive panels, exhibits and other media should be **pre-tested (evaluation)** to see if they actually accomplish their stated objectives. Why would any manager want to pay for interpretive “anything” that does not actually accomplish anything meaningful?

This Christmas I went to a store to purchase some new Christmas lights. When I got them at the store I tested them there – plugged them in – some didn’t work. That pre-test helped save me a trip back to the store. I could get lights that did work right then and there. But if you develop an “interpretive” panel, send it to the client or site, and it is installed, but it “doesn’t work” – you can’t take it back for one that does – it will stand there “not working” for years. Pre-test the panels to make sure they work before you fabricate them. “Measure twice and cut once” my father the carpenter used to tell me.

Let's look at an example of an interpretive panel to illustrate how Tilden's interpretive principles were used.



Test ANY of your current interpretive panels or exhibits to these standards. Do they/ have they used these principles?

Can you guess what the learning, behavioral and emotional objectives were for both the total interpretive trail, and for this one individual panel?

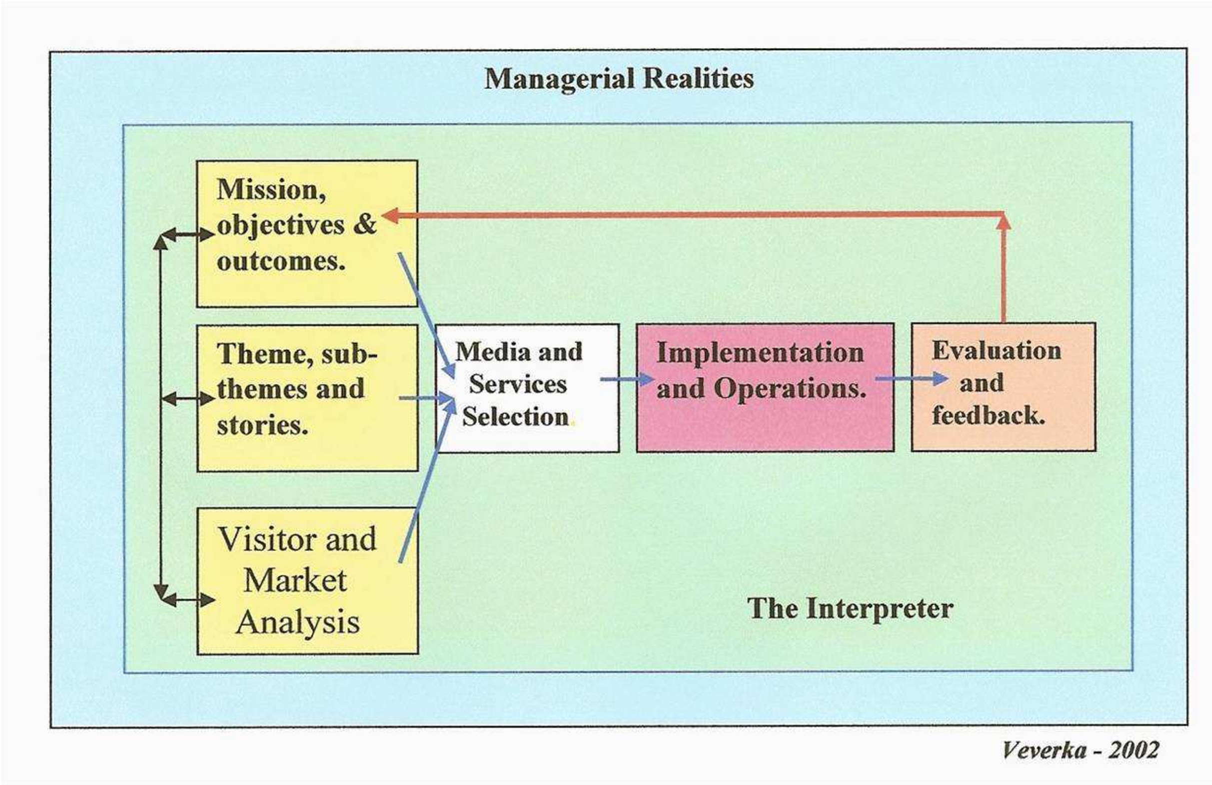
The main objective that interpretive planners wanted visitors to remember, understand and feel: ***That Heron's Carr is a real wildlife treasure house!*** The visitors will probably forget most of the specific examples, but leave remembering the main point that was illustrated about 10 times along the trail. If they leave "feeling or believing" that Heron's Carr is a real wildlife treasure house that should be protected and preserved – you get a gold star!

Interpretive Graphic Standards
There are many different interpretive graphic standards available which illustrates more examples of truly interpretive panels. This article just touched on some of the main points. There are more. If you would like a copy of the interpretive graphic standards we developed, just send me an e-mail (jvainterp@aol.com) and I will send one off to you.

Truly interpretive panels are a lot of work – it is always harder to say less to get more in return. Mark Twain in writing a letter to a friend said "Dear Bob, I'm sorry this letter is so long… I didn't have time to write a shorter one"! Anyone who writes "copy" understands this completely.

So when is interpretation NOT interpretation? Now you know. I hope this little “rant” helps you transform your interpretation from just information to “inspiration” and **you provoke, relate, and reveal** you messages in new and powerful ways. Here are a few books and publications that can also help understand or confirm the power of real interpretive communications.

The model of interpretive planning.



Another review of the model of interpretive planning that we have used for many years now, for planning just about everything, from interpretive systems plans and landscape museums to single interpretive panels.

We can think of the interpretive planning process in sections.

First you see the large box in the model called **managerial realities.** These are issues that you might have problems with: budget, available staffing, political support, time, existing policies or directives, mission, etc. We identify these at the start of the interpretive planning process so we can do the plan with these constraints in mind.

Then find the big box that all the parts reside in called "The Interpreter". That's you if you're the interpretive planner, or your planning team. There's always more than one right answer, and each interpreter or team brings their own unique values, ideas, creativity and knowledge to the project. Within this big box is *the process*, which I have divided into sections or tasks:

Section I – includes three components.

1. For the interpretive plan we must clearly identify, write, or create the specific **objectives** that we want interpretation to accomplish for the total Botanical Garden experience for visitors. These include Learning, Behavioral and Emotional objectives.-

Here are some examples of these kinds of objectives:

Learning Objective: *Upon completion of reading the interpretive panel the majority of visitors will be able to identify three (s) key components of a plants reproductive strategy*.

Emotional Objective: *Upon completion of their visit to the Botanical Garden the majority of visitors will value and appreciate their native plants in a new and more powerful way.*

Behavioral Objective: *Upon completion of their visit to the Botanical Garden 10% of the visitors will want to consider landscaping their home gardens with native plants.*

2. We conduct a **complete inventory of all interpretive sites and resources** where we want to have some interpretation take place. From this inventory of interpretive sites and features we then develop our **main interpretive theme**, sub-theme and story line that we want to present and illustrate to visitors. In general we may inventory:

    - G – Geological sites and Features
    - B – Botanical Habitats
    - BD – Botanical Demonstration Areas.
    - SBD – Seasonal Botanical Demonstration Areas.
    - F – Facilities (Interpretive Centers, Gift shops, etc.).
    - H – Historical sites, facilities or features.
    - R- Research sites, demonstrations or programs.

I generally give each category a code (G = Geological, etc.) as a way of grouping interpretive resources. These codes will appear on our standard interpretive planning forms to help identify each unique interpretive site or feature within the property. So if we have seven different biological habitats within the garden, each will be coded as: B-1, B-2, B-3 and so on.

3. We also need to know as much about our **visitors** as possible. Who they are, where they come from, age groups and related demographics, seasonal visitation patterns, and their main motivations for the Garden visit. What do THEY want to know, learn, or experience with you today?

Section II - **In Section II of the plan we look at all of the sites that are part of the inventory, and look at the objectives we want to accomplish site wide. Then we begin to match up the objectives with the locations.** We use a standard interpretive planning form set **to record this. For each planning form for each individual site we include:**

- **Interpretive Significance** of the site or feature (why are we interpreting it?).
- Interpretive concept we want to use this site to illustrate (ecological principle, adaptation, stewardship issues, etc.).
- **Site Objectives** – things we might need to do to prepare the site for visitors, such as add a paved walkway, viewing area, benches, etc.
- **Interpretive Objectives**. These are the main ideas or concepts that we want the visitors to learn, feel, or do. The DELIVERABLE for that sites interpretation.
- **The recommended media** to accomplish those objectives, such as an interpretive panel, demonstration planting, live program, interactive exhibit, self-guiding booklet or other media or services. Also the estimated costs for developing those media.

Section III – Section III of the interpretive master plan is the Implementation and Operations section. I usually do a summary matrix of all the interpretive sites. On the vertical axis are the recommended interpretive sites from the inventory. On the horizontal axis are the recommended media, fiscal year, and costs. This way I can do a 3-5 year implementation strategy for implementation/budgeting the total interpretive plan programs, services, and media.

Section IV – One of the most important parts of the interpretive plan is the EVALUATION section. It is critical that you provide a strategy for pre-post testing any/all new interpretive programs, services and media to make sure they are accomplishing their objectives. If you paid $2000.00 for an interpretive exhibit – do you have proof that you are getting $2000.00 in BENEFITS from that exhibit?

Here is our interpretive planning content outline for an interpretive master plan.

The Interpretive Assessment and Planning Methodology.

Based on the **Model of Interpretation**, the methodology we use for interpretive assessments and planning services will follow the basic interpretive planning outline.

General Interpretive Plan Outline

I. Introduction and Scope of the Plan.
   A. What was the scope of work the plan was to cover?

II. Main Interpretive theme and Sub-themes (from focus workshops and site resource analysis).
   A. Main Interpretive theme and rational.
   B. Main Sub-themes and rational.
   C. Interpretive story-line flow bubble diagram.

This part of the planning process is where we identify our main interpretive theme or message. This can be accomplished in several ways (and probably gone over in detail in the Interpretive Master Planning course), but in general, here is how I do it:

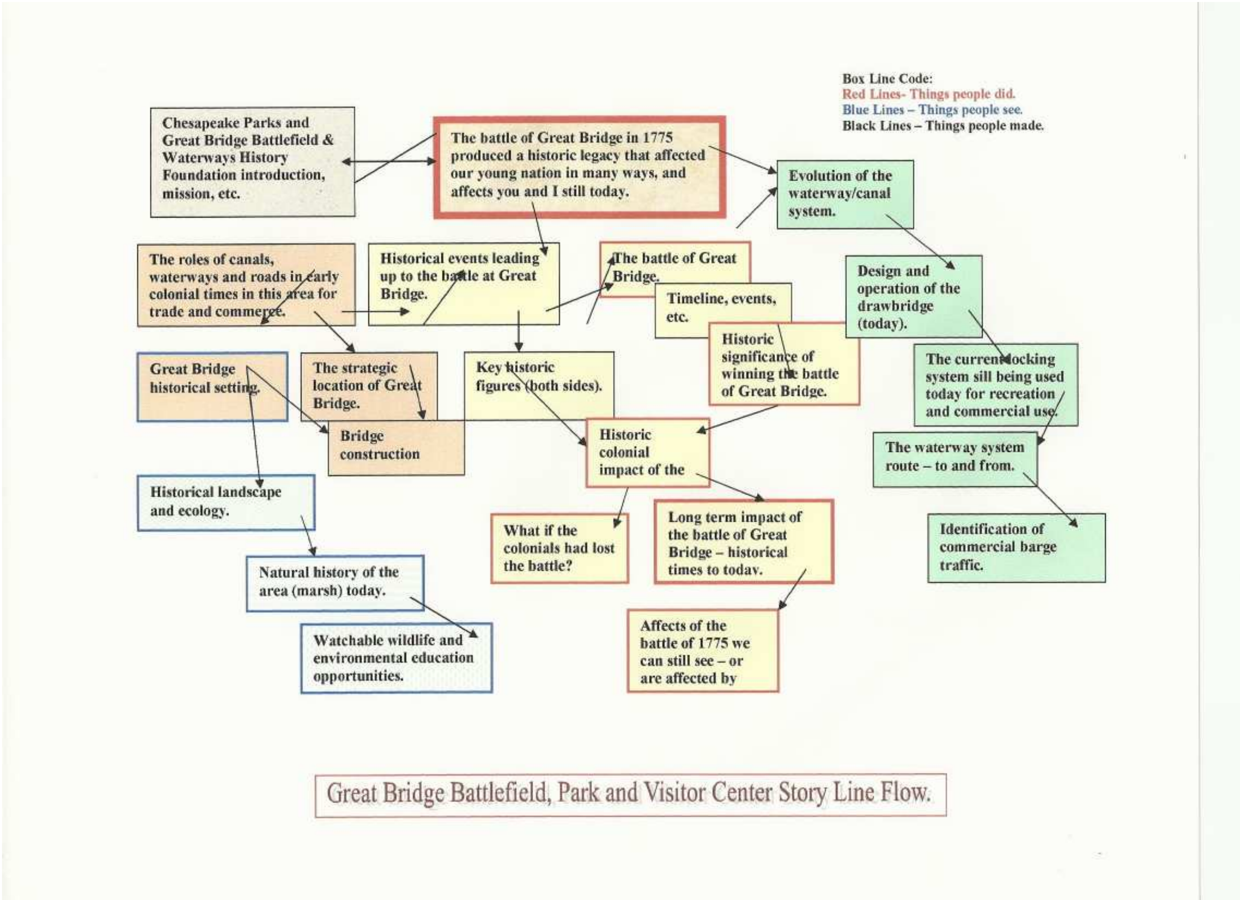
- Do a complete inventory of the site (if the project is a site interpretive plan) to determine its main resources, stories, and importance.
- And/or do a focus workshop with the staff to determine just what it is they want the interpretation to accomplish. I usually take the results from this and do a story line flow chart. One is illustrated on the next page. From this we develop a detailed **story line flow chart** where each story topic is connected to a higher story, and to the main interpretive theme.

An interpretive theme:

A theme is the central or key idea of any presentation, exhibit, or other interpretive media. It is the one idea or statement that, if nothing else, the visitor will remember from the program.
Themes:

1. **Are stated as COMPLETE sentences.**
2. **Contain one basic idea.**
3. **Reveal the main purpose of the program or exhibition.**
4. **Are interestingly or motivationally worded.**

Sample Story Line Flow Chart (complete interpretive plan for Great Bridge is included with this proposal. It represents all of the main interpretive objectives and the main interpretive theme an sub-themes.



III. Total interpretive program/services objectives (Learn, Feel, Do).
(This is for **the total interpretive program/services effort** – site and/or visitor center combined. This usually comes from a focus workshop, and edited based on the interpretive site resources review.)

A. Learning Objectives
B. Behavioral Objectives
C. Emotional Objectives

When we start the planning process the first thing we do is establish the objectives the interpretive plan, or interpretive media, or program are to accomplish. You cannot plan ANY interpretive program or service professionally if you don't know what it is the interpretation is supposed to accomplish.

When we develop objectives we develop three kinds of objectives. The relationship between the objectives and our ultimate financial considerations will become obvious. Those objectives are:

1. Learning Objectives
2. Behavioral Objectives
3. Emotional Objectives

Learning objectives are the things you want the visitor to learn, be able to describe, list, etc. Here are some examples:

- **Upon completion of the interpretive program the majority of visitors will be able to describe three reasons preserving historic buildings has value.**
- **Upon completion of the interpretive program the majority of visitors can describe three reasons why birds migrate in winter.**
- **Understand how global warming affects native habitats.**

The **behavioral objectives** are how you want the visitor to USE the information or inspiration from the program, exhibit, or other media presentation.

Upon completion of the program the majority of visitors will:

- **Want to visit other parks or historic sites in our system.**
- **Consider becoming a member of our organization.**
- **Think about volunteering for our organization.**
- **Will begin to practice good stewardship while walking our trails.**
- **Not litter the landscape.**
- **Pick up their dog doo.**

Emotion drives behaviors. Here are some examples of **Emotional Objectives.**

Upon completion of viewing the exhibits the majority of visitors will:

- **Feel a greater sense of community pride.**
- **Support our forest management schemes.**
- **Feel our program benefits them personally in 3 ways.**

IV. Visitor Analysis.
(This is usually based on **existing visitor data** as doing new visitor surveys is both time consuming and expensive). Sections of this part of the plan can include:
A. Visitation numbers and trends over the past 3-5 years (graph this data).

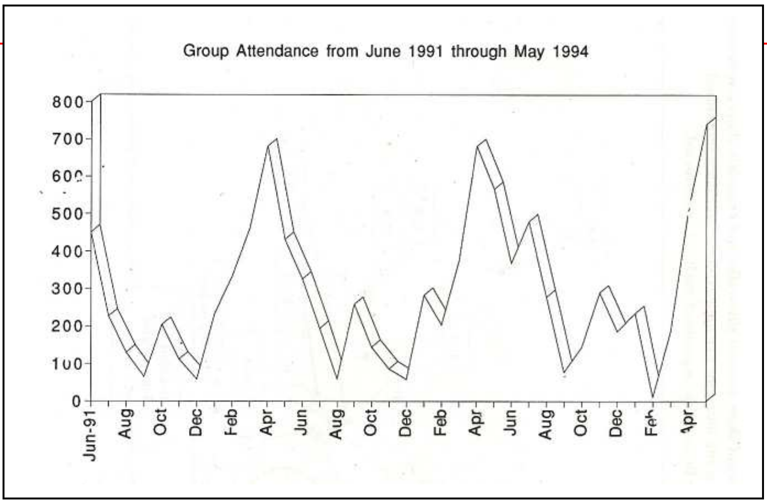
B. Basic market profile – who are the visitors, where are they traveling from, how long are they staying, gender and age variables, etc.
C. Visitor experience desires or focus (why are they visiting this site?).
D. Seasonal visitation trends or issues.
E. School group and curriculum based interpretive planning needs and issues.
F. Visitor Management Issues (relate to behavioral objectives).

This is a key part of the total planning process, especially for financial planning. If we are going to be charging admission fees, or hope to make money from food service or gift shop sales, etc. we need to know how many visitors we need to be able to break even, and better yet, make a profit.

Market Analysis:

- Who are our visitors (local, non-local, tourists, etc.)?
- What are their age groups?
- What are their socio-economic variables?
- What are their interests and experience desires?
- What are their travel restrictions?
- How would they get to (find) our site or location?
- How would I market (advertise) our programs/services to them?
- Would programs/services need to be changed weekly, monthly, seasonally, annually?
- What seasons of the year would be the busiest (visitation graph)?
- What kinds of numbers of visitors can I expect (and how can I find this out)?

Here is an example of a visitation graph from a project. We graphed monthly visitation over several years. This was part of a feasibility analysis for a new museum. This analysis tells us a lot about the visitation patterns and dynamics of each park.



V. Individual Site Interpretive Inventory and Story Development Forms.

A. Site resource location/inventory map. This map would show the locations of each interpretive site, feature, facility, etc. that an interpretive planning form set would be completed for (existing or proposed).

B. Interpretive Site Index list. This is a list of all of the interpretive sites inventoried and included in the interpretive planning form sets that follow.

C. Interpretive Planning form sets for **each interpretive site** inventoried including orientation sites, facilities, trails, demonstration areas, historic sites, natural resource areas, etc.(existing or proposed).

For each planning form set include:

a. *Site Inventory Form.*
1. Site Index Number (keyed to map).
2. Site Name
3. Site Location (reference site index map, etc.)
4. Site Description (refer to photos if available).
5. Interpretive Significance (why are we interpreting this site?).

b. Story Development Form Set:
1. Main Interpretive Theme/Topic for each individual site.
2. Site Objectives. These are **physical development objectives** such as building a stair way, add a viewing deck, etc.
3. Interpretive program/services objectives. These are the *specific objectives (learn, feel or do)* that interpretive programs, services or media are to accomplish at this specific site.
4. Recommended Interpretive Media for this location. This is a list of the interpretive media that could best be used to accomplish the stated objectives (i.e. self-guiding trail, interpretive panel, outdoor demonstration, guided walk, exhibit in a visitor center, etc.).
5. Any budget issues or estimates. This helps make each individual interpretive planning form set a "mini" work plan for each individual site or feature that is part of the interpretive plan.

VI. Five year implementation and operations strategy/matrix.
This includes: Site Index Number – each Interpretive Media or Site Development needs – Fiscal Year for implementation – estimated cost for each site/item listed.
This allows us to plan priorities and costs for actually implementing the total interpretive plan 5 years down the road.

In the I &O part of the plan we figure out:

- **The process and phasing for the implementation?**
- **What is needed to implement the program, service?**
- **What will it cost in time, money, staff?**
- **How will we advertise it, where, when?**
- **Where will the funding come from, and when?**
- **Will this be a one-of, weekly event, monthly, etc. – i.e. the scheduling of the program or services?**
- **In master planning, will it be a 3-5 year phasing to implement the planning recommendations?**

Here is a sample page from a 5-year I&O matrix. The sample page is from the interpretive plan provided with this proposal for Great Bridge Battlefield and Waterways Park.

Great Bridge Battlefield & Waterways Park.

Implementation and Priorities Matrix

Index #	Media/Services	06	07	08	09	10	Cost Estimates
GB-1	COE Lock Viewing Platform - Three Interpretive Panels, 2'x 3' as specified.						$3000.00 each
GB-2	Waterway Viewing Area(s) - Two 2' x 3' Interpretive Panels as specified.						$3000.00 each
GB-3	Main Kiosk by boat Launch Area. - Two 3' x 4' panel inserts. - Option of one insert as above and one bulletin board.						$4000.00 each $4800.00
GB-4	Secondary Kiosk in Boat Launch Area - One 3' x 4' panel insert.						$4000.00
GB-5	Picnic Area Kiosk (proposed). - One kiosk design/built as illustrated. - One Bulletin Board Insert. - One 2' x 3' interpretive panel insert.						$3500.00 $300.00 $1500.00
GB-6	Main Information/Orientation Kiosk - Three 3' x 4' interpretive panel inserts. - Bulletin board insert.						$6000.00 $9000.00 $400.00

VII. Evaluation recommendations. How will you know if the interpretive media you are going to purchase actually works (accomplishes its objectives), such as pre-testing interpretive panels in draft form, etc.

VIII. Appendices as needed.

What are the Benefits of using this Interpretive Planning strategy?

- It helps you organize your presentation to the visitors as to why the site has value – to them (the visitor), to the community, and perhaps regionally or nationally.
- It is the interpretation (programs, guided tours, exhibits, and experiences, etc.) that visitors come to the site/facility for – the story and site experience. It help them to understand what they are seeing in real terms. Interpretive services are one of the main reasons visitors **come back** to the heritage site and other related sites.
- Carefully planned interpretive programs and services can help increase visitation by increasing the perception of BENEFITS visitors receive by going to a particular facility, or site.
- Interpretive programs and services provide added value to any heritage experience and are important aspects for site marketing efforts and membership recruitment.
- You cannot have heritage tourism without interpretation. Heritage tourism is dependent upon the story of the site and the willingness of visitors to want to travel to see, learn about and experience the site.
- Well-planned and evaluated/updated interpretation brings in more visitors, more repeat visitors and more income.
- The interpretive plan provides interpretive strategies to allow visitors create their own unique choice of ways to experience and learn about a site and its story (mass customization).
- The interpretive plan organizes the facilities, sites, trails, experiences and stories in a way that helps protect the resource while engaging and inspiring visitors.
- You will find it very hard to accomplish your overall mission and objectives using less effective communication strategies. Through your Interpretive Master Plan you also create a media plan, marketing plan, and long term development plan as well.

The Interpretive Planning is your way to insure that your messages are truly connecting with, and being understood by your audience in the most cost effective way possible. Can you truly be successful without one?

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Chapter 2 - Interpretive planning for Visitor Informal Contacts and Outreach Program Development

School group outreach program held at a park nature center.

I put together this chapter as the subject of this aspect of interpretive planning is often left out of interpretive planning books. Yet most agencies work with staff and volunteers to plan, develop and offer these kinds of services. Planning for them should use the same interpretive planning model that we talked about in Chapter 1. This chapter was designed to serve as a resource and planning guidelines tool for interpretive planners that might be new of planning for visitor informal contacts and outreach program. Let's start with policies for these services.

Developing Interpretive Contact and Outreach Policies.

Most organizations that offer various types of informal visitor contacts and outreach programs have policies on how these activities might be operated. Any organization will need to develop specific policies for these activities. Here are some sample policies.

Outreach Activities - *Communication efforts involving interpretive programs that reach a diverse population such as students, teachers, organized groups, and general public beyond the boundaries of agency facilities, or making special programs/activities/tours available to these market groups - inviting them to use/enjoy/learn about/ and experience the park or heritage site you are managing.*

a. An Interpretive Services and Outreach Program (ISOP) shall be implemented at each of the agency sites. The type and magnitude of this program shall be determined by the site director and Education/Interpretation Director and shall be commensurate with the type and size of the site visitation, funding, and personnel resources. In addition, all ISOP efforts shall provide for universal accessibility where practical. All activities under this program shall be designed to accomplish one or more of the following goals:

(1) Achieve management objectives using interpretive techniques.

(2) Provide environmental education to foster voluntary stewardship of natural, cultural, and created resources.

(3) Incorporate heritage site/agency accomplishments into interpretive programming.

(4) Improve visitor and employee safety using interpretive techniques and on-site visits.

(5) Use outreach to accomplish ISOP goals, including interpreting agency missions, promoting stewardship, and solving management problems. The interpretive process should also encourage interest in math and science, including career interest.

(6) Enhance the visitors' experience and enjoyment by anticipating their needs and providing interpretive resources to meet those needs.

b. Individual parks/heritage sites shall be responsible for the administration and management of their Interpretive Services and Outreach Program. Interpretive/Education offices shall be responsible for implementation of the ISOP program. The agencies should designate an ISOP coordinator.

c. Each site/organization shall designate a point of contact (POC) whose function is to implement the ISOP at the local level. Each site shall develop an interpretive prospectus for inclusion in the sites Operational Management Plan to be used as a planning document in implementation of the ISOP.

d. Heritage sites/organizations are encouraged to use a variety of staffing sources in conducting the ISOP. This includes permanent and temporary rangers, support staff, summer aids, volunteers, contractors, cooperating associations and others. Sites shall be encouraged to make use of static communication techniques such as interpretive signs, publications, and self-guided tours where personal communication is not possible or practical.

f. Quality training in interpretation shall be made available to rangers, managers, district and division office team members, and others who have job responsibilities related to the interpretive programs and outreach. All personnel with interpretive duties, including permanent, temporary, and seasonal employees as well as volunteers, should receive appropriate training. to their individual work requirements.

g. Formal guidelines and policies for staff to be assigned for interpretive roving, outdoor and interior "interpretive stations" duty and related roving operations shall be further developed for each arboretum.

h. Specific guidelines, reservations forms, fees and related outreach activities shall be developed for school visits (on school property or school visits to the site) shall be formulated by the agency/organization Interpretive/Education Staff.

Outreach Programs: Some Ideas to Guide Policies

Outreach efforts often are valuable because they give your organization an opportunity to reach new audiences and focus messages to meet the goals of the occasion or the partnering organization.

With limited staff resources, some things to consider when deciding which outreach efforts to support include:

1. Which outreach efforts fit our mission?
2. Which outreach efforts are we capable of staffing with limited staff resources?
3. How will participating in this outreach benefit our organization and the organization or individuals we are reaching out to?

How do we plan outreach in advance? There is a balance to be found between staffing an outreach event and keeping the staff member in their "usual job." Which will bring more benefit?

When considering outreach there are more questions that need to be asked:

1. "If I'm going to send staff members to an outreach event, will they reach a sufficient number of people to counter the fact that they are not doing their usual job?"

2. "Do we do enough outreach that it is cost effective to have a staff member dedicated to outreach?"
3. Should a designated "outreach coordinator" coordinate participation in outreach or should they be the person who staffs all outreach events? (The latter is impractical due to scheduled days off and staffing conflicts)

4. Will this outreach effort bring in new visitors that would not otherwise be reached?

5. Will this outreach effort bring in increased revenue, sponsorships or donations?

It is also imperative to evaluate the effectiveness of the outreach to determine if it was worthwhile. What adjustments need to be made for next time?

(Thanks to Pat Barry, Certified Interpretive Planner for his contribution to this chapter.)

Visitor Informal Contacts - Roving Interpretation for parks and heritage sites.

Roving interpretation/informal visitor contacts is just what it sound like. The interpretive/education staff schedules time during the day, weekend or busy hours on the park or site grounds to meet visitors informally. *"Hi and welcome to* ___________ - *how is your visit going? Do you have any questions?"* is a general way to meet and greet visitors.

In planning for interpretive roving time and services consider:

- Best time of day to do the roving - meet and greet visitors.
- Determine how long you can "rove" given your daily schedules.
- Determine the route or locations you want to rove to and through such as trails, picnic areas, vistas or view points, other locations where visitors may be located.
- Determine what materials about the site/agency you will take with you such as:
    - Site maps.
    - Program or event schedules
    - Items you can interpret to visitors or children.
    - Magnifying glass
    - Plant identification book.

Planning how to approach visitors while you are roving - some guidelines.

Here is where your visitor experience comes in handy, when to, and not to, approach visitors while you are roving.

Don't approach visitors when:

- They are involved in discussions with their group or family (don't interrupt).
- They are walking to restroom, food service areas, parking lots getting ready to leave.
- Look hot or uncomfortable unless you can direct them to shade, air conditioning, etc.
- Are taking care of children (changing diapers, etc.).
- Can you add some other times you don't bother visitors ?

Do approach visitors when:

- They come to you - see your uniform and have questions for you.
- They look interested in a particular plant or exhibit.
- They look lost.
- They have children with them - children love to have a "ranger" talk with them and the adults learn too.
- People look bored.
- They make positive eye contact with you (wanting to engage with you).
- What are some other "clues" as to when to approach visitors informally?

How to engage visitors once you have made contact.

Once you have meet the visitors and they are ready to talk or interact with you, there are some ways you create "curiosity" with them and get their attention.

Here are some ideas:

- Carry some items with you that they may be curious about, such as the ram horns shown in the photo above. Other items could be a artifact, part of an unusual plant like a large seed pod, or some other items. You can also have video, photos, etc. on your smart phone or on an iPad.

- Ask them questions, such as we mentioned earlier - how are you today, I bet you don't know or can't guess what this is (item being carried), etc.

- When you talk with children, kneel down so you can talk with them "eye-to-eye".


Park Ranger Helping Visitors

What other engagement ideas can you come up with?

How to inform visitors about Arboretum programs and activities?

This is an easy one to think about. First, if you tell visitors about upcoming events, programs, and activities, they will promptly forget what you told them. The best idea is to ask the visitors if they are interested in upcoming programs or events if they would like a program or event schedule. These can be daily, weekly or monthly events. If the visitors have a smart phone see if they would like an park or heritage site APP? Then they can easily find out about upcoming event and programs. You might also carry a business card with your site/agency web site address.

Another temporary learning station is a "point of contact" station. In the photo below, the ranger is stationed at a viewpoint during busy hours to interpret to visitors the history, geology to biology that they can see from this vista. In addition, the ranger provides a role of safety and security for the station as well. The staff person may be assigned here on particular days of the week or hours of the day.

Outreach program development.

Planning for outreach program involve more "planning" and policies as noted at the beginning of this recourse manual. Many organizations have a library of outreach programs that can be presented both on site, or off site.

Here is a check list for developing outreach programs.

- Develop a list of program topics to offer based on the your mission and interpretive objectives. For example outreach program topics (on or off site) could be:

* Plants in our culture and history.
* How to develop a community garden.
* Plants we use in our medicine.
* There are many reasons plants need insects.
* Plants in pioneer cooking.
* How climate change is affecting our habitats and ecosystems.
* Secret life in our soil.

From the list of program topics, develop:

* Objectives for the program to accomplish.
* Length of the program (one - two hours for example).
* Locations to offer the program at your site.
* How to offer the program off site.
* Teaching needs and materials.
* AV equipment needed if any.
* For off-site outreach, travel distances and costs.
* What the host site would need to supply.
* Fees for off-site outreach if any.
* Reservation requirements and lead time.

On the following page is a sample outreach registration form. This form would be completed by the education/interpretive outreach program coordinator who would be responsible for scheduling the outreach program and dealing with any related fees.

Your Park, Museum or Heritage Site Name
Outreach Reservation Form

Group or Organization: ____

Contact Phone and e-mail: ____

Point of Contact: ____

Outreach program topic requested:

___ Plants in our culture and history.
___ How to develop a community garden.
___ Plants we use in our medicine.
___ There are many reasons plants need insects.
___ Plants in pioneer cooking.
___ How climate change is affecting our habitats and ecosystems.
___ Secrets life in our soil.
___ Special topic request: ____

____

Participant details:

Age of group if school group:____

Curriculum requirements if any: ____

____

Any participants with disabilities: Yes___ No___

If yes please explain any special needs: ______________________________

Other adult group details (age, special interests, mobility issues if any).

____

____

Number of participants: __________

Requested date for program: ___________________________

Requested program presentation time of day: 9:00 AM___ 10:00 AM___ 2:00 PM___

Length of program: 1 hour____ 1 1/2 hour____ 2 hour_____ Other_____

Fees associated with outreach program if any: _______

Pre-program materials and policies to be sent to the Group Coordinator for "off-site" presentations: Yes____ No____ Details: (use back of reservation form).

Agency Staff Point of Contact: ___________________________________

Program Scheduled by: ____

Agency Staff Assigned to deliver the program: _______________________________

Assigned meeting point (if to be presented your site): _______________________

____

Your park, museum or heritage site name
Outreach Program Planning Checklist

Group or Organization: ____

Group Contact Person: ____

Contact phone number: ____

Number of program participants: _________________

Age group/grade level (school groups): _________________________________

Program time length: 1 hour___ 1 1/2 hour____ 2 hours____ Other: _____

Driving Directions Provided (if off site): ____

____

Meeting point (for Arboretum on-site programs): __________________________________
____

Date for program: ___________________________

Starting time for program: __________________________

Location(s) to be used: ____
____

Materials and teaching aides needed:

____

____

____

____

(Other items can be added to this form as needed based on final outreach policies and specific program needs.

Sample Outreach programs and management needs and policies from other organizations:

When an organization requests to have an outreach program most agencies will also send the some basic outreach policies for their information. The following are samples of some of these pre-outreach planning details.

Travel

The Outreach Program fee includes the first 20 miles round trip. For destinations greater than 20 miles away, an additional mileage fee will be applied.

For locations more than 50 miles from the Museum, a later start time may be required. Locations more than 120 miles from the Museum may require an overnight stay, billed to the customer. If an overnight stay is required, the organization is responsible for a $20 food allowance for the presenter, for the day of presentation.

Location Requirements

One indoor location must be set aside for all presentations within the scheduled program time. Other events should not be scheduled simultaneously in the presentation space. However, several programs do offer festival-style presentations. Once the presenter is set up, the program cannot be moved. Details of the presentation environment will be agreed upon during scheduling.

Billing

You will receive an itemized invoice by email stating the total price of the program when your date is confirmed. Your program is not confirmed until you receive this invoice.

Please let us know at the time of confirmation which method of payment you would like to use. If your district or organization requires further paperwork to process payment, please communicate this to the Outreach Coordinator in advance and we will be happy to assist.

Adult Supervision

An adult chaperone must be provided by the organization booking the event. An adult from the organization scheduling the outreach program must be present **at all times**, for the entirety of each presentation. If an adult is not present, or student behavior is unacceptable, we reserve the right to stop and cancel the remainder of the program, without a refund

Time Allowed For Presentation

Most presentations can be adjusted to last anywhere from 25 minutes to 45 minutes, depending on the age of the audience and schedule at the school or organization. We recommend that presentations for Grades Pre-K through 2nd be limited to 30 minutes.

For most programs, the Outreach Program fee includes a certain amount of total time at the school or organization. For example, a 3-hour, Half Day booking can include either six 30-minute presentations, or four 45-minute presentations. **This time is calculated from the start of the first presentation to the end of the last presentation, and also includes any necessary breaks.** Some programs are priced per presentation.

Program Date and Schedule

The Museum's Outreach Coordinator will work with you to define an on-site schedule for the day of your presentation in advance. **The final times of your presentation schedule will be confirmed at least 3 days before the program, and once agreed upon must be adhered to.**

If your organization's representatives request additional presentations on the day of the program, these may be accommodated at the Presenter's discretion. If these require the Presenter to remain at the organization for longer than the time initially booked and confirmed, there will be a charge for any additional time required to complete the additional presentations, including breaks between the presentations.

Our staff will do everything possible to accommodate your preferred date, time, schedule and program type. However, all HMNS Outreach Programs are subject to availability. Please contact us at least 4-6 weeks prior to your preferred presentation date to allow for the greatest flexibility in scheduling. If available, presentations booked on major holidays will require an additional fee.

When your program date and schedule is confirmed, the Outreach Coordinator will send you a final document with policies and the details of your program as agreed upon.

Rescheduling and Cancellation

If a schedule conflict arises, let us know and we will do our best to find another date for your program. For bookings canceled within 7 days of the performance date, there is a cancellation fee of $100. The fee does not apply if the program is rescheduled for a later date.

Unforeseen Circumstances

In the event of an unforeseen circumstance, such as a severe weather event, natural disaster, etc., we will work with you to reschedule for a new date. If an unexpected delay such as a road accident or vehicle breakdown occurs, we will communicate with you to determine the best course of action. If our presenter is able to arrive and deliver a portion of the booking, we will prorate the price to reflect the amount of presentation time received.

Interpretive Planning for Developing and Managing a Volunteer Program to Assist with Interpretive Program Outreach Programs and Demonstrations.

Many organizations now utilize volunteers to assist with outreach programs and Informal Visitor Contacts. This section of the resource manual will present planning and management issues for operating and using volunteers in these important program and services delivery.

<u>Volunteer Policies</u>

1. *Agency name* will utilize volunteers to supplement professional staff – not replace them.

2. Volunteers will be required to participate in ____ hours of volunteer training to make them familiar with the museum operational policies, mission, and rules.

3. Volunteers will be required to maintain their own insurance coverage for any accidents that may occur on museum property during sanctioned volunteer duties.

4. Volunteers will keep a record of all volunteer hours served (dates/times).

5. Volunteers can be asked to leave their volunteer positions should the museum staff and board feel that their service is no longer needed.

6. All center volunteers, will be required to wear an official museum name tag or other identification while performing their volunteer duties.

7. Volunteers are not able to perform a minimum number of volunteer hours per year can be dropped from the volunteer roster.

8. Volunteers involved in interpretive/educational programs will undergo an annual training workshop in interpretation techniques in working with families or school groups.

9. Volunteers will receive annual training (as needed or available) in local natural and cultural history, artifact operation, or other related topics important in their communication with the public of accurate information.

10. The Board of Directors will sponsor an annual volunteer recognition dinner/awards program. The board may develop a variety of recognition "rewards", from certificates of achievement, to special service awards for volunteers.

11. Volunteers may assist the agency in any fund raising activities, performing services and duties as directed by the Center Director.

12. Volunteers should not conduct any newspaper or other media interviews concerning the agency policies, programs, goals, mission or related topics or otherwise represent themselves as a museum “representation” in such interviews without the permission of the center director and/or board of directors.

13. Volunteers may be compensated for travel expenses association with any designated volunteer duties (travel to and from fund-raising events, school tours, etc.) if the volunteer requests such reimbursement, and prior approval by the board of directors.

14. Volunteers may be sponsored to attend center related training courses, workshops or seminars if the information/skills obtained at those opportunities benefits the agency and/or assists the volunteer in performing their volunteer duties in a more professional manner, and approved by the board of directors.

15. Volunteers may officially represent the agency at heritage site/interpretive related conferences, workshops and seminars if they paid their own way to the activity/registration fees, with the approval of the Center Director, and list the agency and their affiliation on any registration forms, name tags, etc.

Working with Volunteers

1. Start With a “To Do” List - brainstorm a list of all the tasks that volunteers could accomplish at your project. Each staff person can create their own list of tasks that they do that a volunteer could do or tasks that they never have time to do that a volunteer could do.

2. Write Job Descriptions and Standard Operating Procedures for every volunteer task, i.e., "staffing the Visitor Center front desk", presenting guided tours, outreach programs, etc. When you train them, it's very important that potential volunteers know exactly what the job involves as well as any potential hazards associated with the job.

3. Train your volunteers in customer service, the content of what they need to know, and interpretive techniques to help them spread your message.

4. Assure that all appropriate paperwork is completed. It is imperative that volunteers and a National Arboretum staff member sign and date a volunteer agreement. Maintain copies of volunteer applications and time sheets. Tracking volunteer hours is very important for a lot of reasons including dollar value of volunteer efforts, milestones for recognition, etc. Volunteers should have access to their file and maintain their own hours.

5. Brainstorm a list of potential sources for volunteers - think beyond the traditional sources to include juvenile court "candidates", college professors needing a semester project for their classes, sororities and fraternities, local clubs, retired professionals, etc. Check references and, if necessary, do background checks.

6. Let others do the volunteer coordinating for you! Recruit a volunteer to serve as your volunteer coordinator! If you don't have that luxury, recruit volunteers from sources that coordinate/organize themselves, i.e., Scouts, Community Service groups such as Jaycees, Kiwanis, Junior League. Encourage groups to "adopt" a volunteer project or area.

7. Treat volunteers with utmost respect and don't patronize. Even the youth/adult completing court ordered community service deserves respect.

8. Motivation - For every potential volunteer, there may be a different motivation for wanting to volunteer. It is very important for you to understand that motivation to retain them. One volunteer may be motivated by new skills gained while another may be motivated by the personal contacts made while staffing a Visitor Center. Say, “Thank you!”

9. Have an established plan for rewarding volunteers to include any benefits, perks, rewards, awards. Assure that your "benefits package" is offered consistently to all volunteers, if applicable. Remember to say, “Thank you!”

10. Make boundaries/restrictions/policies clear to all volunteers and enforce across the board. Believe that some folks given an inch will take a mile.

11. Have an established evaluation plan and assure that all volunteers are aware of the evaluating plan when they start their work. Ask for feedback from your volunteers and routinely evaluate your volunteer needs and program. Ask them to evaluate you, your staff, services, and facilities too!

12. Get involved with volunteer organizations such as the United Way. They can recruit local volunteers for you as they maintain files of potential volunteers. Participate in organizations such as DOVIA, (Directors of Volunteers in Agencies). Learn from the pros!

13. The best way to learn about effective tools for managing volunteers is to BE a volunteer, whether is be through a service organization, your church or child's school, Habitat for Humanity, Junior League, etc.

14. Remember: The volunteer program is not a free program so invest in your volunteers by recruiting the right ones, providing training, a safe and satisfying work environment, good facilities, and job satisfaction!

To help you along the following is a sample of a volunteer application form. You can use this as a guide to develop your own volunteer application form .

Volunteer Application ***for Natural Resources Agencies***			Instructions: Mark ☑ in the appropriate boxes, for other items either print or type responses. If extra space is needed use item 18.
1. Name (Last, First, Middle)	**2. Age**	**3. Telephone Number** ( ) -	4. Email Address
5. Street Address (include apartment no., if any)		**6. City, State, and Zip Code**	

7. Which general volunteer work categories are you most interested in?

☐ Archeology
☐ Botany
☐ Campground Host
☐ Construction Maintenance
☐ Computers
☐ Conservation Education
☐ Fish/Wildlife
☐ Historical/ Preservation
☐ Pest/Disease Control
☐ Minerals/ Geology
☐ Natural Resources Planning
☐ Office/Clerical
☐ Range/Livestock
☐ Research/Librarian
☐ Soil/ Watershed
☐ Timber/Fire Prevention
☐ Trail/Campground Maintenance
☐ Tour Guide/Interpretation
☐ Visitor Information
☐ Other (Please specify)

8. What qualifications/skills/experience/education do you have that you would like to use in your volunteer work?

☐ **Backpacking/Camping**
☐ **Biology**
☐ **Boat Operation**
☐ **Carpentry**
☐ **Clerical/Office Machines**
☐ **Computer Programming**
☐ **Drafting/Graphics**
☐ **Driver's License**
☐ **First Aid Certificate**
☐ **Hand/Power Tools**
☐ **Heavy Equipment Operation**
☐ **Horses – Care/ Riding**
☐ **Landscaping/Reforestation**
☐ **Land Surveying**
☐ **Livestock/Ranching**
☐ **Map reading**
☐ **Mountaineering**
☐ **Photography**
☐ **Public Speaking**
☐ **Research/Librarian**
☐ **Sign Language**
☐ **Supervision**
☐ **Other Trade skills (Please specify)**
☐ **Teaching**
☐ **Working with People**
☐ **Writing/Editing**
☐ **Other (Please specify)**

9. Based on boxes checked in items 7 and 8, what particular type of volunteer work would you like to do? (Please describe any specific qualifications, skills, experience, or education that apply)

_____

10. Are you a United States Citizen? ☐ **Yes** ☐ **No (If no, additional information may be required)**

11. a. Have you volunteered before? ☐ Yes ☐ No
    b. If Yes, please briefly describe your volunteer experience.

12. Would you like to supervise other volunteers? ☐ Yes ☐ No

13. What are some of your objectives for working as a volunteer? (Optional)

14. Please specify any physical limitations that may influence your volunteer work activities:

15. a. Which months would you be available for volunteer work?

☐ January ☐ February ☐ March ☐ April ☐ May ☐ June
☐ July ☐ August ☐ September ☐ October ☐ November ☐ December

15b. How many hours per week would you be available for volunteer work? Hours

15c. Which days per week would you be available for volunteer work?

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday
☐ Sunday

16. Specify at least three states or specific locations within a state where you would like to do volunteer work.

17. Specify your lodging needs:
    ☐ I will furnish my own lodging (such as tent; camper; own, relative's, or friend's place)
    ☐ I will require assistance in finding lodging

18. If a volunteer assignment is not available at the location specified in item 16, do you want your application forwarded to another location or Federal agency seeking volunteers with your background/interests?
    ☐ Yes ☐ No (Please specify)

19. This is provided for more detailed responses. Please indicate the item numbers to which these responses apply:

Burden Statement

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0596-0080. The time required to complete this information collection is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

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Notice to Volunteer Volunteers are not considered Federal employees for any purposes other than tort claims and injury compensation. Volunteer service is not creditable for leave accrual or any other benefit. However, volunteer service is creditable work experience. By signing this application the volunteer(s) understand(s) s/he may be subject to a reference check, background check, and/or criminal history inquiry.
Privacy Act Statement *Collection and use is covered by Privacy Act System of Records OPM/GOVT-1 and USDA/OP-1, and is consistent with the provisions of 5 USC 552a (Privacy Act of 1974), which authorizes acceptance of the information requested on this form. The data will be used to maintain official records of volunteers of the USDA and USDI for the purposes of tort claims and injury compensation. Furnishing this data is voluntary, however if this form is incomplete, enrollment in the program cannot proceed.*

20. Signature (Sign in ink)	**20. Date**

Chapter 3 - Financial considerations in interpretive planning.

We often forget that the "things" we plan for in interpretation - outreach and volunteer program, interpretive programs, tours, panels, exhibits, etc. cost real money. So I thought it would be important for an advanced interpretive planning book to look at the issues we need to bear in mind as planners.

One of the first issue we think about is what is meant by interpretive success. We have developed several different formulas to assess Big Picture "success".

Financial Success

For every heritage site, the first rule of business is to "stay in business". This means that the heritage site has to be financially successful. So the success equation might look something like:

For Financial Success –

Overhead and Operations Costs - Visitor admission fees and related sales

+ Outside funding = a positive number.

Success can be a "break even" goal, or a goal to make a profit to enable the site to do repairs, add staffing, do restoration work, etc. Interpretation brings in visitors and $$.

A second type of "success" equation might look like:

Political and community support (as success). = quality interpretation presentation + quality of site experiences + real or perceived benefits of the site/agency to visitors and the community + evidence of value and benefits.

For this "success" to occur the site must be using quality interpretive communications to maximize the visitors and community perception and value of the site – and support the site mission. It is difficult to accomplish this type of success to its fullest potential without active and powerful site based interpretation (programs and services) and exploiting interpretations powerful "public relations" potential.

A third type of "success" is measured by the level in which the historic site mission and objectives are accomplished:

<u>Cost of Interpretive Programs/Services</u> Number of visitors that receive the message	+	The % rate at which the objectives were accomplished.

= benefits greater than the cost of the contact (yes or no).

In other words, if you spent $100 on an interpretive panel, and 100 visitors saw and read the message, then the cost per contact would be $1.00. The questions is "what happened as a result of that contact"? If you spent $1.00 per contact and, as a result, had a management objective accomplished at a 70% level – let's say a reduction in littering or less complaints about a management activity - then a reasonable cost per contact for a high cost effectiveness ratio (getting a real return for your interpretive investment) = success.

In this example as well, professional interpretive planning and design is key to the successful **cost effectiveness** of the interpretive media or services presentation. The media must effectively motivate, stimulate, inspire, and touch visitors for them to "react" to the message.

So no matter which type of *success* you are interested in, one or probably all, you cannot ever reach your true success potential in heritage tourism for your site without using quality, professional interpretation (programs, services, media and staff) to effectively communicate to your various target market groups.

In today's economy interpretive planners have to be mindful to what things cost. So when we recommend any interpretive media as part of a site/park interpretive plan, we consider:

- What will the interpretive panel cost? On average in 2015 dollars, that would be about $3000.00 on up depending on all the planning, design, fabrication, delivery (shipping) and installation costs.

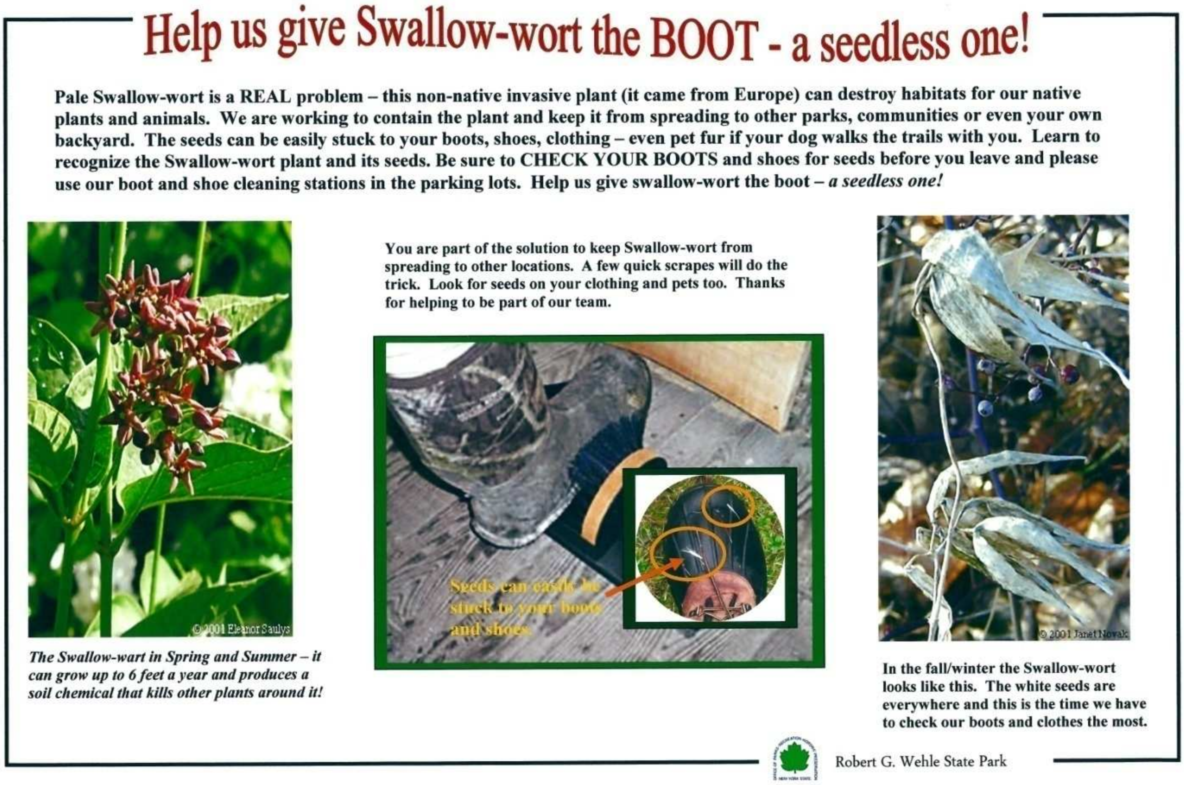
- For the $3000.00 spent, over the average 5 years of life of the panel, what will be get in return for the investment? Will our objectives be accomplished? At what level? This is a good argument form pre-testing the panel before final fabrication.

- Will there be any short or long term maintenance costs?

- What would a "replacement" cost if this panel is vandalized?

So in general, for ANY interpretive programs, services or media you are planning, recommending or suggesting please ask:

For the money spent on this media, will I get at least $2.00 or more in return for every $1.00 spent on that media. What will the real return be on our interpretive "investment"?



Which definition of "success" do you think the above panel was designed for?

Interpretive Planning Feasibility Analysis for new interpretive facilities.

This level of interpretive planning requires a new way of thinking about interpretive facilities, their potential long term sustainability if developed. Here are some simple steps you can take when thinking about the financial feasibility of a new facility.

1. First, what is the mission, topics, services, programs that the new facility would offer, and is there any competition within the region offering the same interpretive products?

2. I would visit each one and look at:
   - an inventory of what they offer.
   - any seasonal operations (open all year, seasonally, by appointment, etc.)
   - who are their visitors (market analysis)? Local visitors, regional visitors, school groups, members, etc.
   - What are their annual visitor numbers.

   Note: if you are offering a "complementary" interpretive experience you will probably be sharing the same audiences who visit the other interpretive sites/attractions.

3. Based in the average numbers from all the regional interpretive sites we can use the following formula for predicting your visitor numbers on a busy weekend in the summer:

Design Load For Visitor Centers

This case study example was taken from the Great Bridge Interpretive Plan visitor center feasibility and operational analysis. Based on existing visitor data, and using the formula below to estimate the visitation at one time the proposed visitor center might expect, a visitation worksheet was developed for Great Bridge Lock Park proposed visitor center.

This number is: 120 visitors at one time, on a weekend day during the peak seasons. This is visitors **in the building**. The number of visitors on site (walking trails, visiting the two parks (assuming they can be joined by a walkway under the drawbridge, and other recreation activities) could be twice that number or about 240 visitors on site or higher at one time.

The worksheet for the visitation estimates is shown below.

For this example we are assuming that 80% of the site visitors will use the center.

$$DL = \frac{VI \times .80 \times VS \times VW}{NW}$$

DL = Design load for the visitor Center
VI = Total visitation for the facility/site (estimate).
VS = Percentage of visitation occurring during your peak season.
VW = Percentage of peak season visitation occurring on weekend days or holidays.
NW = Number of weekend days or holidays during the peak season.

$$DL = \frac{521{,}000 \times .80 \times .80 \times .70}{27} = 8{,}644$$

To determine people at one time (PAOT) expected in the center:

$$PAOT = \frac{DL}{H \times TR}$$

DL = design load from above.

H = number of hours of operations (8 used in this example).

TR = Turnover Rate (estimated 20 minutes length of visit or turnover of 3 visitors per hour).

$$PAOT = \frac{8644}{8x3} = 360 \text{ people at one time at your busiest time.}$$

WHAT NEXT?

360 visitors will need 25sq.ft. of floor space each as a MINIMUM for psychological carrying capacity. That means this facility needs an exhibit room and/or space of 9000 square feet if all the visitors were in the facility at one time. This also means that the parking lot would need parking spaces for at least________ cars – and what about coaches?

Then you may need to add in space for:

- Offices
- Restrooms
- Storage
- Electrical
- Meeting room(s)
- Public space/reception
- Other building functions.

New Visitor Center visitation analysis worksheet.

VI = Total visitation for the facility/site (estimate from current use data) – 64,345.

This number reflects ½ of the total number (from traffic counter – entrance and exit), and assuming 2 visitors per car.

VS = Percentage of visitation occurring during peak season (July – November) – 54%

VW = Percent of peak season visitation occurring on weekends or holidays (est. 45%)

NW = Number of weekend days or holidays during the peak season – 42

Given no new influx of visitors due to new building and facilities, the projected number of visitors to the new visitor center, on a peak weekend day would be: 298 visitors.

Assuming the new visitor center facility and park attract additional tourists (most of the above numbers are local visitors and not tourists), we can estimate that the number of weekend peak day visitors could reach 600 on peak season weekend days or higher.

Given the busiest time of operation on the summer weekends will be from 11:00 – 3:00, and that most of the total day visitation will be peaking between these hours, the estimated *People At One Time* in the new visitor center could be: 120 or higher.

This would mean that an exhibit gallery area would need to have space to hold this number of visitors at one time, or about 2400 square feet of floor space (depending on exhibit design).

Note, this is an estimate only, and based on visitation projections, and estimated turn-over rates in the building of approximately 30 minutes/visit. Food service, shopping and programs could decrease the turn-over times. These turn-over times will also affect available parking spaces as well during peak weekend visitation hours.

We would note that these visitor number would reflect visitors traveling by car to other destinations (tourists), local visitors who may be at the adjacent park for boating or fishing, and can walk over to the new visitor center for restroom breaks or food service, and boating traffic waiting for the drawbridge to open, and lock time waits who can dock by the visitor center. These additional numbers for summer peak times could drastically alter the “visitor at one time” on weekend day estimates.

Visitor Center Overhead and Operations Costs (Average Costs for Reference).

Part of any new Visitor Center planning must include an estimate of operating costs in relationship to cash flow. Here is a general example of operating cost examples for a 15,000 square foot facility. It would be adjusted for current costs.

- Electricity/heating/cooling $3000.00
- Water/Sewage $800.00
- Telephone $400.00
- Internet access $50.00
- Web Site Maintenance $50.00
- Office Supplies $300.00
- Mail/Postage $200.00
- Alarm System Service $100.00
- Maintenance Supplies $150.00
- Gift Store Stock $1000.00
- Gift Store supplies $230.00
- Accounting Services $175.00
- Teaching Aides/Materials $300.00
- Exhibit Maintenance $250.00
- Collections Management $250.00
- Temporary Exhibits $1000.00
- Computers/equipment $200.00
- Outreach education programs $1000.00
- Volunteer program management $500.00
- Marketing $1500.00
- Memberships $100.00

For these items, monthly cash flow OUT would be**: $11,555.00** per month. **This cost does not include any staff salary or site maintenance (cutting the grass, trash pickup, etc.).**

This was the worksheet for the new Great Bridge Visitor Center feasibility and operational analysis – plug in your own costs to figure out your operating overhead.

Remember, the above costs are the expenses you have each month. So the question is "where will the income come from to pay the monthly bills? That is the second phase of your feasibility analysis.

Demand reality for a new facility?

Based on all of the above and including:

- Competition analysis
- Competition for select market groups (i.e. school groups).
- Competition for members.
- Competition for funding donors.
- Agency long term financial support (if a city or municipal facility).
- Markets and populations numbers to support the needed visitor numbers for fees, etc.
- Internal and external funding sources.
- Funding sources can cover expenses and overhead.
- Staffing and staff salary requirements.
- Construction costs for required space.
- and a who lot of other issues ..

We can make a recommendation of yes or no for our feasibility and operation analysis as part of our interpretive master planning process.

Chapter 4 - Planning for experiences and markets of one.

Moving forward while standing still? In preparation for developing this chapter on new cutting-edge approaches to interpretive planning, I spent some time looking through the now many text books on interpretation to see “what was new”. What I found was new ways of saying “old ideas”, or more complex ways of presenting simple concept and more convenient ways of getting the message out. While our visitors to parks, museums, historic sites and related interpretive attractions have change greatly in “why they visit” over the last few years, we have generally fought to keep pace with our interpretive planning strategies to meet visitors changing needs, interests, and their search for memorable “experiences”. And the word “experience” is the key to interpretive planning for programs or services, or interpretive master planning for parks, historic sites, or even regional interpretive systems planning. It’s time to update interpretive planning for today’s visitors.

"Stuff based" interpretive planning has been the norm. There seemed to be more effort in planning where and what interpretive media we would use, than consideration of “is that what the visitor wants or needs”? And many interpretive plans ignore the visitor except for basic demographics. I think that often we forget that the purpose of the interpretive plan is to eventually be implemented! And successful implementation involves accomplishing meaningful objectives related to “does the visitor get it!” about your site’s story. Do their on-site experiences relate well to our desired “outcomes” from those interpretive experiences? Today’s interpretive plans need to focus on accomplishing this.

One planning philosophy we promote is that you should be able to demonstrate how every dollar spent on your interpretive programs and services will yield about five dollars in benefits. These are benefits for the organization, resource, your mission, and most importantly, to your visitors. To accomplish this goal we need to consider content additions to interpretive plans. These benefits can be both tangible and intangible. For example benefits might include: reduce littering or solving management problems, recruiting more volunteers, increasing revenue, broadening appeal, building support in the community, providing more cost effective media and services, increasing visitation, and so on. This is how you argue for funding for implementing the plans recommend development, media and services – what will you get in return from your interpretive investment. Does your plan do that?

The next big thing we have been working on in our interpretive planning and training courses, is adding the elements of experience based and outcome based interpretive planning strategies. Besides the inventory of interpretive resources such as geological, historical, ecological features, etc. we have also included an “experience inventory” based on the book “*The Experience Economy*” by Joseph Pine and J. Gilmore. Essentially what we know is that different sets of experiences will attract or discourage visitors who are looking for a particular set of experiences.

Let’s take a look at the experience model (Figure 1) and I’ll give some examples as it applies to interpretive planning and marketing interpretive programs and services.

The Experience Realms.

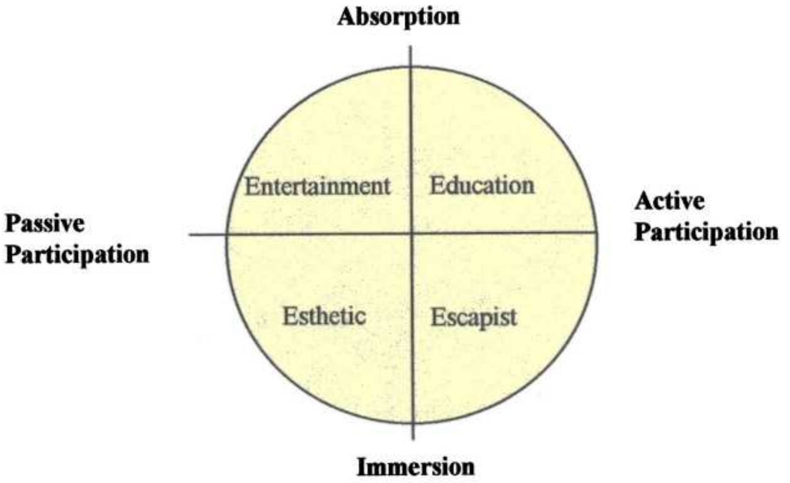


Figure 1 – Mutually compatible experience domains often co-mingle

Essentially Pine and Gilmore illustrate that there are four basic ways of engaging in experiences you seek out or take part in:

Passive Participation – watching an interpretive amphitheater program for example.
Active Participation – taking part in a hands-on interpretive demonstration or activity.
Immersion Experiences – being in the forest, on a lake, in a historic home, scuba diving.
Absorption Experience – this is where you are so focused on the experience like watching a great play or movie that you forget about time (day dreaming while driving – ever miss an exit?).

Now, there are also four basic kinds of experiences you can engage in. You may be looking for:

Entertainment experiences – like going to a movie, playing a video game or watching a living history program.

Educational experiences – you want the experience to teach you something, challenge critical thinking and puzzle problem skills, or you want to learn a new skill or advance your knowledge level of a subject.

Esthetic experiences – watching the sun set, looking at and smelling wildflowers, being in and looking at a garden, visiting an art gallery (which could combine many different experiences).

Escapist experience – going on a long hike where you won't see another person – taking a canoe trip or getting lost in a good book.

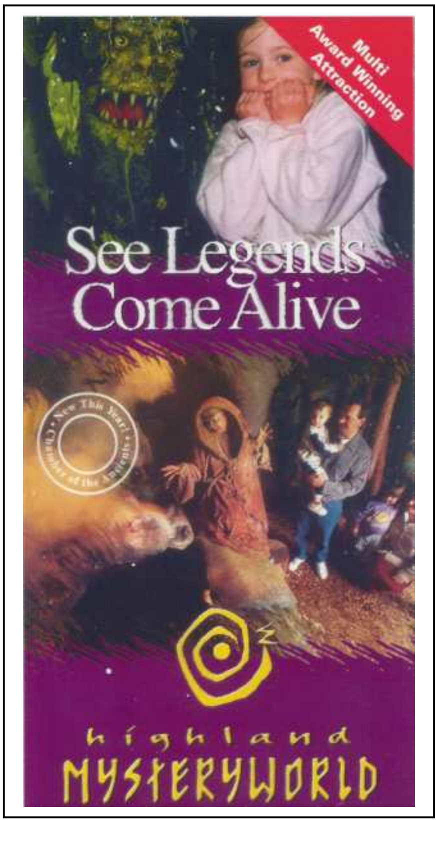
To me this is one of the most important aspects of any interpretive plan – what experiences do you offer, or want to offer? We do an experience inventory as part of the total plan interpretive inventory to address this issue and how it may affect current or future visitation or market shifts.

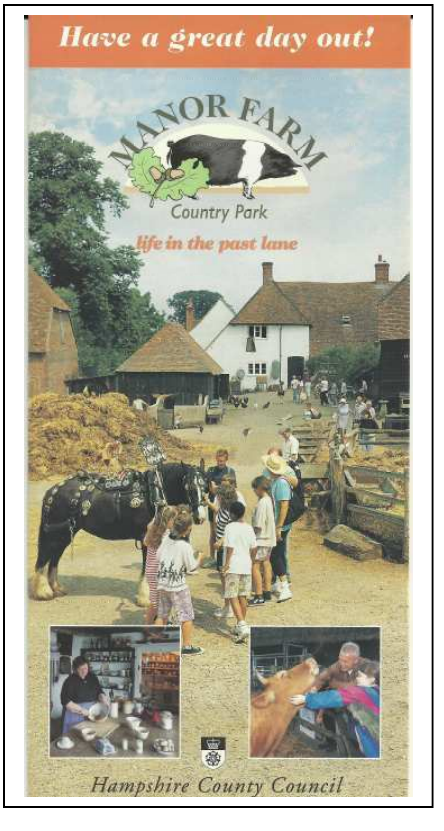
Now we know that visitors don't usually come to interpretive sites for just one experience nor do they come alone. I often think "if I brought my family" would there be something for everyone; mom, wife, daughter, son and I? The visitor may want an educational interpretive walk that is also entertaining (edutainment) in the morning, want to watch a demonstration in the afternoon, and just watch the sunset in the evening. If you're developing an interpretive program schedule – do you have just one kind of experience you're offering or a diversity of experiences?

Here is how it works in simple terms: The kinds of experiences you offer at your interpretive site or facility is often directly related to the kinds of audiences you can attract that "want" that kind of or mix of experience!

If you want to attract new or different audiences or age groups, you have to add or modify new kinds of experiences market groups would have an interest in as appropriate for your site.

If you look at advertising for interpretive sites you can see how that works. Here are two different brochures. What experiences are they offering and to which market groups?





So, in general, as part of cutting edge interpretive planning we now spend a lot of time in looking at authenticity, experience realms and experience inventories as part of our audience needs and marketability for interpretive programs and services – interpretive planning for new experience mixes.

The Importance of authenticity should be noted here. My associate Matt Kaser reminded me of this important aspect of our interpretive panning. " I remember reading Josephs Pine where he mentions the highly and masterfully designed recreation of things. When the dad says to his son "we are going to see a real ship wreck" and the boys says " oh like in the movie..., or like the Pirates of the ... at Disney, or the haunted house, or the family entertainment center, etc.) In Mass customization idea I often think of the phrase – '**The truth remains consistent, no matter how fine you sift it**'. Interpretively speaking, the story and theme remains consistent no matter how you divide it up or repackage it ... because it is *authentic*, rooted in truth, rooted in the inherent resource."

But there's more. Related to the kinds of authentic experiences visitors may seek, we have to add in the kinds of interpretive **program topics** that visitors may have an intrinsic interest in as part of the draw too. I learned from my MS thesis on "Visitor Motives for Selecting and Attending Interpretive Programs" many years ago that different sexes and age groups like different program topics and different program delivery methods (experiences) for different reasons, which I have to add into the interpretive planning process. This can be accomplished with a survey of current programs or services and proposed new programs or services and having visitors' select their topic choices for programs they have the most interest in attending and why? For example, of the 30 program topics I surveyed, I found that visitors over 45 years had an interest in a program topic on "*what your family can do to help the environment*" – but they wanted hands-on examples they could do at their own home in the program content. Visitors under 45 weren't much interested in that topic. The program topic "Snakes the deadly hunters" was preferred by visitors under the age of 25 for esteem motives (and edutainment), while visitors over the age of 25 wanted to learn safety tips for avoiding snakes in the park. One audience but with a mix of different desired outcomes from the same program. Mostly women preferred the first program on the environmental issue while mostly men wanted the program on snakes. So program topics and the experiences and motives associated with them enter into the interpretive plan and marketing mix.

That's just a taste of these new elements required for professional interpretive planning. Now let's look at "Mass Customization" for interpretive planning strategies and program/services offerings.

One size does not fit all in interpretive planning! When I first read the book *The Experience Economy*, there were also companion books recommended. They included: "Mass Customization" and the book "Markets of One". While designed for the retail and tourism markets, their ideas have direct implications for interpretive planning as well. I have been incorporating these concepts into our interpretive plans for several years now, and here is a summary of how they work.

Mass Customization in interpretive planning involves looking at the wide range of interpretive programs, services and topics that visitors might want to experience, learn about and enjoy. But in interpretation one size does not fit all. For example, most self-guiding trails have only "one" story or theme, and if that one story or topic is not to your interest, you might walk the trail, but not use the interpretive media. The interpretive content might be too simple, too complex or cover a topic they're not interest in. With mass customization as part of an interpretive plan, we can phase in 10 or more different interpretive trail guides for "one" trail.

For our example here we could have many trail guides based one general theme like "Our forest landscape is always in a state of change.", but we can have many different self-guiding topic options such as:

- Our forest landscape…. (guide for spring, summer, fall, winter).
(guide for introductory, intermediate or advanced topics)
(guide in 2-3,4 or more different languages)
(guide for wildflowers, trees, succession, land management, etc.)

This range of guides could all be for the same trail. The guides would exist on your web site as a PDF for printing from a computer or be downloaded to a smart phone. They can exist as a printed guide, and audio guide, or a video guide. The visitor could "customize" the season, complexity, language and media (printed, smart phone) they want the guide to provide based on their interest or needs from a trail guide web based library.

Now imagine if you had more trails, each with many different themes, adaptations, learning styles and levels, and experiences. More mass customization – a mall of individualized opportunities for visitors to discover and experience your stories based on each visitors unique needs, interests and learning styles (Markets of One).

For larger projects, like the 500 mile long **Susquehanna River Greenway Interpretive Systems Plan** in Pennsylvania we developed a few years ago, the mass customization matrix included over 200different interpretive sites, museums, parks, and related heritage areas that could be developed/marketed for Greenway wide auto tours, bus tours or theme/topic based tours or events. Each interpretive experience could be customized to the user's interests, knowledge levels and experience types ready for them to find and select at the Greenway web site (currently in development).

The mass customization interpretive planning inventory and assessment for each individual site selected along the 500 mile long Greenway included:

- Main interpretive stories or topics or resources the site presented.
- Current experience opportunities at each site.
- Quality of the interpretive resources/experience (best example, average example, most accessible example of a particular category, such as civil war sites, environmental sites, railroad history, canal era history, etc.
- Analysis of existing interpretive media or services.
- Recommended new interpretive media, services and experiences.

- Tourism readiness issues (tour bus ready, up to 30 visitors at one time, only 5-10 visitors like for a historic home tour, or not tourism ready)

The data from all the sites were then summarized in a variety of mass customization matrices including:

- Site by topic (railroad, historic home, scenic vista, natural history features, etc.)
- Site by tourism readiness.
- Site by interpretive media or experiences.
- Site interpretive media implementation priority and costs.

When the mass customization matrices were completed they gave us a big picture of just what were the main interpretive topics, stories, resources and interpretive development opportunities for the whole 500 mile long greenway corridor and how we might be able to connect them for different themed experiences.

How would we use this? If a visitor was interested in historic cemeteries for example, they could click on a search engine at the Greenway web site for historic cemeteries and all the cemeteries that were available for interpretation, their key stories or residents, web sites, locations and any interpretive materials would pop up. This person (or group) could then plan a historic cemetery tour through the greenway. The same for any other topic such as historic homes, railroad history, Civil War sites, and so on.

The **tourism readiness analysis** gives future planners for tour bus route development and auto tour development a list of what different interpretive heritage sites could handle for visitor numbers. This ranking also included such issues as wayfinding, restroom facilities, hours of operation, and related logistic information.

It allows visitors traveling to, or living in a very large region, like a National Heritage Area, the ability to easily "customize" their visit based on the topics they are interested in and the kinds of experiences they are looking for.

The Quest for Outcomes is one of our main goals in interpretive planning, and the essence of outcome based planning. The interpretive plan has to provide the information and strategies (short and long term) to actually accomplish something, both tangible and intangible. What we look for in our interpretive plan outcomes includes, but are not limited to:

- Are learning, emotional and behavioral objectives actually being accomplished both for the total plan and organization, as well as for individual resources or features within the site?

- Getting $5.00 in benefits for every $1.00 spent on implementing the interpretive plan. This seems to always be left out of interpretation planning, but is our best arguing point to keep interpreters from being "let go" when budgets are cut. Interpretation should create more benefits than it costs whenever possible and interpreters need to be able to justify their work and benefits in real dollar terms.

- Sustainability – ensuring the resource with its unique place and message will live on and on for future generations. Sustainability will result by default if the Interpretive Planner stays true to the "rule" and tells the truth (maintains authenticity for the site story and its presentation or experiences). Truth is always stranger than fiction. Such trends of laser discs, slide shows, stiff mannequins, etc. will come and go and be replaced by new delivery systems, like the iPhone, but the authenticity remains.

- Attracting more visitors, or more theme based visitors, or more experience based visitors based on our mission and resources and more mass customization opportunities.

- Making more income from interpretive programs and services (experience based) – including more memberships and membership renewals based on the organization offering a wider range of experience opportunities to constantly changing visitor market needs and intereses.

- Making our interpretive messages “memorable” – we remember 10% of what we hear, 30% of what we read, 50% of what we see and 90% of what we do. Experiences translate to memories, both bad or good ones. And visitors tend to remember bad ones for a long time! Interpretive planning needs to take an offensive approach of anticipating problems and issues in the interpretive plan before they occur and try to “plan them out”.

- Making our interpretive messages “exportable” – so visitors can actually use the information and inspiration from the interpretive experience beyond the park, historic site or facility boundary at their own home, community or in future interpretive experiences elsewhere.

All this fits into our general Interpretive Plan Outline and are integrated into the content of the interpretive plan. A copy of this outline is available to the JVA website.

For years interpretation and interpretive planning has focused on the same content, and many plans still focus mostly on the design and location of interpretive “media” without asking if “that’s what the visitors really wanted or needed” and how will this enhance the total site experience and outcomes? And we’re not leaving Tilden behind – the principles of provoke, relate and reveal and the use of tangible and intangible concepts are imbedded in all the final presentations and delivery media the interpretive plans recommend. That’s what makes the interpretive plan “interpretive”. But we must also use those principles in planning to create a diversity of interpretive experiences – to expand interpretive market groups, and to see visitors not as *numbers* but as a collection of unique individuals with a wide range of interpretive topics and experience interests.

It’s time to ask our visitors what they want, need or attracts them to our facilities and integrate our visitor research into creating new experiences for diverse audiences into our interpretive plans. Movie theaters have learned no matter how nice the theater looks, you have to change the film and movie watching experience to keep them coming back. What kinds of experiences do your visitors want? If your numbers are down, it might just be related to the experiences you are NOT offering. I have reviewed many different “visitor survey tools” for lots of organizations and many surveys have one big flaw. While telling you what your visitors may not like, or on a scale of 1…10 how they rank something, they don’t tell you what to fix! So if a visitor selects a

3 on a 1-10 scale, what does the "3" actually mean? What do I fix to improve or remove the perceived problem? Many of these surveys are not scientifically valid and designed by folks with little or no training in valid survey research design, so as part of interpretive planning we need to fix this too. Visitor surveys need to be tools we can make actual improvements or adjustments from.

Summary

This short chapter provided a general summary of the new interpretive planning concepts from other retail and marketing sources that have direct implications for interpretive planners. We have been incorporating these concepts of Mass Customization, Markets of One and Experiential Marketing into our interpretive plans for several years and found it greatly enhances the outcomes the interpretive plan, when implemented, will deliver. We strive to meet the philosophy of "for every dollar you spend on interpretation you should get five dollars in benefits", into each interpretive plan strategy as well, for obvious reasons. This interpretive planning approach helps this philosophy become reality and creates interpretive plans designed to celebrate and build upon the great diversity of our current and potential interpretive site visitors and get them coming back for more while helping ensure the sustainability of the site or organization.

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Chapter 5 - Regional Interpretive Systems Planning.

When we try to pick out anything by itself,
We find it hitched to everything else in the Universe.
– John Muir

This quotation from John Muir points out one of the challenges for interpretive planning today. While interpretive master planning is generally regarded as essential to the success of any interpretive site or facility, the majority of such plans are site, facility, or park specific, with little attention to a regional context and integration with interpretation at other nearby sites or facilities. Agencies with interpretive planning responsibilities covering extensive areas generally emphasize only those facets or stories directly pertaining to and within the scope of their concern. Little attention is paid to the interface between an agency's mandate and the private sector regarding interpretive stories, themes and facilities. As a result, a large percentage of interpretive efforts tend to be rather narrow in their potential to market regional stories and interpretive opportunities.

What is a Systems Approach?

The systems approach is simply a way of looking at the entire system of interpretive agencies, sites, facilities, and opportunities around your operational region – such as a metro parks system with numerous parks or related sites within the organizational system. There are many different kinds of "systems" that you can consider planning for:

* A regional park district might have three, four, or more parks managed by one agency. systems planning would look at developing an interpretive plan for the total system of parks, seeking the common theme or story that the total park system would illustrate.

* A state park system would look at interpretive planning for all of the parks as one interpretive unit for the total park system interpretive theme and related interpretive objectives that all parks in the system would work to interpret/illustrate.

* A regional interpretive systems plan could be a tourism plan as well. In this kind of planning, different interpretive opportunities available within a given geographical region are analyzed for interrelated themes and opportunities. In a recent project for the Susquehanna Greenway in Pennsylvania, our interpretive systems plan including analyzing: private interpretive sites, county parks, state parks, national forests, city museums, historic homes, vista and viewpoints, Native American sites and more – all residing within the boundary of the 500+ mile long Susquehanna Greenway (following the Susquehanna River from NY to MD).

The Value of the Interpretive Systems Approach.

1. It integrates related facilities, themes, and stories within an agency or with several different agencies or organizations.
2. It facilitates a variety of levels of experience or “interpretive pacing” for the visitor with a common thread of experience on a regional or system-wide level.
3. It facilitates the use of natural, historical, and cultural resources that might otherwise be ignored or overlooked.
4. It enhances optimal use of available physical, financial, and psychological resources within an area or region.
5. It encourages a more expedient and rational approach to planning interpretive services along historic corridors or scenic byways, which may access areas or interpretive resources of many different agencies and communities.
6. It is the main tool for developing large scale heritage tourism plans, for determining the critical mass of tourism opportunities from which to market a regional of interpretive and heritage experiences.

Preparing an Interpretive Systems Plan.

Having developed many different interpretive systems plans for park districts, scenic byways and regional and state greenways, let’s start the “how to prepare an interpretive systems plan” by looking at an outline of just what an interpretive systems plan should contain – our **“Interpretive Systems Plan Content Outline”.**

General Interpretive Plan Outline
For Developing
Interpretive Regional Systems Plans.

IX. Introduction and Scope of the Plan.
- B. What was the scope of the content the plan was to cover?

II. Review of park system current interpretive mission and park agency wide interpretive goals and objectives.

Total interpretive program/services objectives (Learn, Feel, Do).
(This is for **the total interpretive program/services effort –** sites, parks and/or visitor centers combined.)
- D. Learning Objectives
- E. Behavioral Objectives
- F. Emotional Objectives

III. List of individual park resources included in the plan.

IV. Individual Park Inventory and Interpretive Resources Analysis (using our Interpretive Systems Plan Site Inventory and Analysis Form Sets). One form set to be completed for EACH Park/ Area Interpretive Resource/Site to include:

A. Site Name
B. Site Location
C. Site Inventory Index Number (keyed to Site location Map).
D. Current Resource/Site Theme (if any)
E. List of main interpretive sites, features, resources and experiences. This would include any interesting human stories related to preserve history.
   a. Initial analysis of interpretive sites for ranking for Heritage Area Sites x Resource Matrix (i.e. best example of.. – most accessible example of… - Only example of…. –Average Example of…. – No access due to sensitivity of site).
   b. Resource management or protections issues.

F. Park General Interpretive Objectives and Management Goals.
G. Existing interpretive media, programs or services with quality ranking for a Park System Area Wide Site x Media Matrix.
H. Existing infrastructure features for analysis/comments.
I. Resource limitations (to be noted in Section E above).
J. Interpretation provided in the region by other agencies or organizations similar to each heritage area site (data to be provided by client for contacts).
K. Recommended new interpretive programs, services or planning needs.
L. Visitor profile for each Park (This is based on existing visitor data as doing new visitor surveys is both time consuming and expensive).

V. Total Park System Analysis Matrix and Ranking

A. Heritage Area Sites x Topics matrix with importance ranking.
B. Heritage Area Sites x Interpretive Media Matrix with quality ranking.
C. Heritage Area Sites x Recommended Media/Services with **Cost Estimates** 5-10 year phasing.

VI. Recommendations for Heritage Area Outreach Programs and Marketing

So let's take a closer look at just what each of these elements might look like or contain in a step-by-step planning approach.

1. At the start of the systems plan here are some first steps:

a. Meet with staff to determine any existing/current park system policies regarding interpretive programs, services and activities.
b. Discuss with staff any existing interpretive objectives that they want interpretation to accomplish at ALL parks or sites within that system. These include Learning, Behavioral and Emotional Objectives systems wide. Again, these are systems wide objectives.
c. Discuss with staff how they may want interpretive programs, media or services to help accomplish management objectives (reduce vandalism, littering, etc.). Also how interpretation will help visitors understand the park districts "mission".
d. Discuss with staff any visitor management issues – growing new visitors, etc.
e. Discuss and develop a list of all parks/sites to be included in the systems plan and any particular management issues that might be associated with each.
f. Collect any historical reports, research documents, and related materials that relate to particular resources at each individual park (any archaeological work, historic buildings or earth works, historical events, rare or endangered wildlife, etc.).

2. Conduct a detailed interpretive resource inventory at each park/site to be included in the Interpretive Systems Plan. This will include both exist interpretive resources and media, and then also recommend interpretive opportunities and media. In our process we use an "Interpretive Systems Plan Resource Inventory Form**". This form is completed for every park/site within the park/agency systems.** A copy of our form is provided on the following page.

Interpretive Systems Plan
Interpretive Resource/Media Inventory and Analysis.

A. Park/Site Name:

B. Site Location:

C. Site Inventory Index Number:

D. Current Resource/Site Theme (if any):

E. List of main interpretive sites, features, resources and experiences (habitats, geological features, management areas, seasonal natural history events, historic sites or features, vistas or viewpoints, demonstration areas, and related existing or potential interpretive opportunities or experiences).

F. Park General Interpretive Objectives and Management Goals if any:

G. Existing interpretive media, programs or services with quality ranking for a Park System Area Wide *Site x Media Matrix.*

H. Existing infrastructure features for analysis/comments (Kiosks, viewing decks, historic buildings, visitor contact stations, etc.)

I. Resource limitations (to be noted in Section E above).

J. Interpretation provided in the region by other agencies or organizations similar to each heritage area site (data to be provided by client for contacts).

K. Recommended new interpretive programs, services or planning needs.

L. Visitor profile for each Park (This is based on existing visitor data as doing new visitor surveys is both time consuming and expensive).

Include photo examples as appropriate.

3. Total Park System Analysis Matrix and Ranking Summary. This is the most important part of the interpretive systems plan as the analysis via matrices allows the agency to have a clear look at just what they have in the system as far as interpretive resources, stories, and opportunities.

    A. Heritage Area Sites x Topic matrix with importance ranking.
    B. Heritage Area Sites x Interpretive Media Matrix with quality ranking.
    C. Heritage Area Sites x Recommended Media/Services with **Cost Estimates** 5-10 year phasing.
    D. Natural Resources Features Matrix Blank Matrix Form.

The following pages taken from recent JVA interpretive systems planning projects are provided to illustrate how the systems plan will present a summary of research/planning data.

The first three matrices are from the ***Susquehanna Greenway Interpretive Systems Plan***. The Index Number on the far left is the number given for each individual park, historic site or related interpretive site or feature. All of the content on the matrix was taken from the individual interpretive planning/assessment forms completed for each individual site.

The *Natural Resource Features* matrix form is used for systems planning for main park systems (regional parks, metro parks, state parks, and sites with mainly a natural resource base).

The topics/resources listed across the top of the matrix would reflect actual interpretive resources inventoried. There may be several pages with a list of different resources across the top of the matrix depending on the diversity of interpretive natural/cultural history related resources.

Susquehanna River Water Trail
Site x Interpretive Topic or Focus Matrix

Site Index	Historic Home(s)	Historical Person	Architecture & community	Canal	Revol War History	Civil war	Native American	Natural History	Industry Heritage	Rail Road	Other
NB - 354 Oakland PFBC (Great Bend Access).								2			
NB – 351 Susquehanna Depot (Great Bend								2			
NB - H-1 Starrucca Viaduct			3						3	3	
NB - HR-1 D & H Rail Trail			3						3	3	
NB – H-2 Mormon Monument / Joseph Smith	1	1									
NB – 348 Great Bend Access								2			
NB – 342 Hallstead PFBC Access								2			
NB – 290 Sayre PFBC Access								2			
NB – 288 Sayre Riverfront Park Access											
NB – H-3 Tioga Point Museum		1	1	1	1	1	1	1	1		
NB – 279 Ulster Bridge Municipal Access			2								
NB – Towanda Riverfront Park Access								2			

Key: 1 = Tour Bus Ready; 2= Can handle up to 30 visitors; 3 = Less than 10 at one time; 4 – Not tourism ready via policy.

Susquehanna River Water Trail
Site x Interpretive Media Matrix

Site Index	Interp. panels	Orientation Panels	Kiosks	Museum Exhibits	Web Site	Walking Tours	Driving Tour Stop	Live Programs	Cell Phone Interp.
NB - 354 Oakland PFBC (Great Bend Access).		E & AG							
NB – 351 Susquehanna Depot (Great Bend)		E & AG							
NB - H-1 Starrucca Viaduct	RN						RN		
NB - HR-1 D & H Rail Trail		RN				Trail Guide			
NB – H-2 Mormon Monument / Joseph Smith	E	E	E				RN		
NB – 348 Great Bend Access		E & AG							
NB – 342 Hallstead PFBC Access		E & AG							
NB – 290 Sayre PFBC Access		E & AG					RN		
NB – 288 Sayre Riverfront Park Access		RN & AG							
NB – H-3 Tioga Point Museum				E	E		RN	E	
NB – 279 Ulster Bridge Municipal Access	E	E					RN		
NB – 270 Towanda Riverfront Park Access		E & AG							

KEY

E – Existing – OK

ER – Exist should be Replaced

R - Remove

RN – Recommend New Media

AG – Add Greenway Orientation

Review the interpretive plan form set for details.

Susquehanna River Water Trail
Middle and Lower Section I&O Matrix

Index #	Media/Services	09	10	11	12	13	Cost Estimate
MS – 106 Mahantango	- Add a Greenway Orientation Panel						$3000.00
	- Add interp. panel on river geology.						$2500.00
	- Develop a watchable wildlife area.						TBD
MS – 103 Sweigarts Island	- Add River Trail Orientation Panel						$3000.00
	- Potential site for Greenway Panel						$3000.00
	- Panel on State Wildlife Mgt. Program						$2500.00
MS – 101 Liverpool PFBC	- Add a Greenway Orientation Panel						$3000.00
	- Add Panel on watchable wildlife.						$1500.00
MS – 98 Millersburg River Front Park	- Relocate River Trail Panel						TBD
	- Add a Greenway Orientation Panel						$3000.00
MS – 94 Halifax PFBC	- Add a Greenway Orientation Panel						$3000.00
MS – 94w Montgomerys Ferry	- Add a Greenway Orientation Panel						$3000.00
MS – 92e Halifax Borough	- Add a Greenway Orientation Panel						$3000.00
MS – 92w Clemson Island	-No media recommended at this time.						
MS – 88 Haldeman Island	- Repair and re-install Canal Marker						TBD
	- Add Greenway Orientation Panel						
	- Add panel on Propagation Area program.						$2500.00

Site x Interpretive Resource Matrix

Park/Site Index	Geological	Forest Habitats	Old Farm Fields	Aquatic Features and access.	Vistas	Habitat Mgt. areas	Seasonal NH events	Ecological Zones

Note: This matrix would reflect the actual diversity of resources reflected by the individual park inventory and analysis. This matrix could be several pages long/wide and reflect 10 – 30+ different resource types the park system has within it.

Interpretive Systems Planning Matrix Types.

The matrix samples previously shown (first three) were from the Susquehanna Greenway Interpretive Systems Plan. They illustrate one sample page – in the actual plan, these matrixes might be 5-10 pages long depending on how many parks, sites, and features, etc. were inventoried and are part of the systems plan.

The matrix forms illustrated are custom designed for each specific project, and reflect the scope of work for each systems plan. Thus, your interpretive systems plan may use totally different matrices to summarize your findings, or add, change or modify the samples provided. They are a tool to help the agency make management decisions and develop priorities for developing interpretive media, services, or experiences District Wide.

From the Interpretive Systems Plan – New Products and Services.

From the results of the interpretive systems analysis, the agency can develop or update:

- Regional 5- year implementation of recommended new or improved interpretive media and services.
- Recommend objectives for interpretive services to accomplish agency wide.
- Recommend new operational policies for interpretive programs, services and media.
- Develop interpretive Graphic Standards for the total system.
- Offer regional interpretive training for member sites and organizations.
- Create new interpretive opportunities for visitors to visit different parks to continue or link up related stories or interpretive experiences.
- Develop more cost effective interpretive media, programs and services.
- Create new systems wide interpretive media via cell phone interpretation and web site interpretation for the total park/agency system.

References:

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Chapter 6 - Planning for large scale landscape museums. Thinking LARGE

What is a Landscape Museum?

You probably drive by the "exhibits" in a Landscape Museum every day, and don't know you are driving by an "exhibit" in your local, county or regional landscape museum. Of course it is not formally a "Landscape Museum" yet – but it could be like the photo below of the landscape vista from Shikellamy State Park near Lewisville, PA.

Shikellamy Overlook offers two scenic overlooks that are 360 feet (110 m) above the confluence of the West Branch Susquehanna River and North Branch Susquehanna River. This is a stop on a scenic driving tour we developed for the Susquehanna Greenway – and a future "gallery" In a *landscape museum.*

So just what is a landscape museum? Here is the analogy:

- **Think of your County, Region, Scenic Byway or other large geographical area as "the Museum"**. It is a living, vital museum without walls that you may live in, shop at, and it has a history! It is probably full of history, both natural and historical. We just never think of it that way.

- Now think of the interpretive (or potential) interpretive sites located within that "museum" - your County or Region as "the exhibit galleries" in that living museum. These might include: Landscapes such as geological features, glacial features, road cuts along highways where you can see the strata of the bedrock you are driving on, rivers, lakes, historic homes, canals, battlefields, parks, museums (with walls), and other features or facilities that have stories to reveal to the landscape museum visitor within your County or region.

- **Ok – now think of the individual exhibits - trails, vistas or viewpoints, etc. located within each of the large galleries as "the individual exhibits" within that gallery.**

- Now create a series of themed driving tours to link the thematic galleries together – and you have a Landscape Museum – ready for super heritage tourism development and marketing.

The confederate cemetery in Dalton GA is a "Gallery" with exhibits in their Landscape Museum interpretive plan.

How do you plan for a landscape museum? Here are my general guidelines:

1. First we determine the boundaries the Landscape Museum will include. For example, often we work with a County Map if the landscape museum will include one or more counties.

2. Then working with local historians, historical societies, natural history experts, etc. we begin to inventory all of the potential interpretive opportunities that we could include in the landscape museum. The inventory might include, but not limited to:

   * Historic Homes
   * State or National Parks
   * Historic canals
   * Railroad interpretive opportunities
   * Landscapes such as vistas, geological features, unique habitats and ecosystems.
   * Historic communities
   * Important wildlife areas.
   * Native American interpretive sites.
   * Ethnic interpretation
   * Underground Railroad sites.
   * Civil War sites, cemeteries, battlefields, etc.
   * Historic industries

I usually develop an **Interpretive Site Assessment Form** for each potential "gallery". This planning/inventory form includes:

* Site Name
* Site Location
* Driving Directions to find it.
* Historical or Natural History significance
* Existing interpretive services, facilities or media.
* Recommended new interpretive services or media.
* Tourism readiness and access (seasonal – year round)
* Contact personal, web sites, phone numbers, e-mail.
* Photos or existing brochures.

The Dug Gap Battle Park is a great site in our Landscape Museum Plan for Dalton, GA. It has good remnants of Confederate Artillery Cannon in placements, but has seasonal access issues to plan around.

3. **Developing the interpretive theme, sub-themes and objectives.**
This is the most important part of the Landscape Museum Plan, as the rest of the plan will focus on just how to "illustrate the main theme and accomplish the objectives". Here is an example of objectives for the Civil War Landscape Museum Interpretive Plan:

The objectives of the Civil War Landscape Museum.

- To provide visitors with a total sensory experience, to understand and appreciate the history of individual sites more deeply, and to create a stronger connection in understanding the individuals who were engaged in the Civil War actions here.
- To help bring underutilized but important Civil War sites into a new light, bringing more visitors to their locations, and offering a greater protection for those sites.
- To increase heritage tourism in general in Whitfield County and the City of Dalton, Georgia.
- To provide a tool and strategy to allow for other Civil War and related heritage sites to be added to the Landscape Museum over time.
- To serve as a tool to help generate more financial grants to help in the interpretation of and protection of, important Civil War heritage sites, features and landscapes.

- To serve as an economic tourism engine to help create more heritage related employment opportunities associated with the marketing and interpretation of the total Landscape Museum experience.

4. **Based on the inventory of potential heritage sites suitable for the Landscape museum**, we review the recommended interpretive media for each "gallery" and begin to put a budget and phasing strategy with it.

5. We develop our **interpretive site assessment form matrixes** so we have a big picture of just what "galleries" we have in our museum and how to implement them into the total museum.

A sample implementation matrix is on the following page.

We also summarize "tourism readiness" for all the sites as well on the following pages.

Civil War Landscape Museum

Implementation and Priorities Matrix

FY 2000

Index #	Media/Services	11	12	13	14	15	Cost Estimate
H-4	Trail from the Mill Village to Mt. Rachel.						
	-Standard National Park Service type interpretive panels at key civil war fortificatin locations.						$3000.00 each
	- Development of a formal trail-head sign/panel that would include:						$5000.00
	-Trail map and distances						
	-Trail walking time (one way up and down).						
	- Photo of key trail features.						
	- Trail walking safety information						
	- Development of cell phone interpretation about the civil war sites.						See total site media matrix
	- Other cell phone interpretation about natural history features could be added						See total site media matrix.
H-5	General Johnston's Headquarters						
	. -Being a formal stop and view with a self-guiding "Landscape Museum" driving tour booklet.						See total site media matrix
	-This would also be an excellent site for using cell phone interpretation.						See total site media matrix.
H-6	Former Depot (now the Depot Restaurant).						
	-Recommend interpretive media would be two 2' x 3'exterior interpretive panels on the civil war history of the depot.						
	They could be located near the entrance to the building.						$3000.00 each
H-7	The Old Chester Hotel						
	-Possible interpretive panel for a exterior wall mounting.						$3000.00

Tourism Readiness Summary

Ranking

Site		**#1**	**#2**	**#3**	**#4**
H-1	The Hamilton House and grounds.		X		
H-2	Whitfield-Murray Historical Society Museum/Archives		X		
H-3	Crown Mill National Register Historic District (includes the mill, mill store and school)		X		
H-4	Trail from the Mill Village to Mt. Rachel				X
H-5	General Johnston's Headquarters on Selvidge St				X
H-6	Former Depot located at 110 Depot St.		X		
H-7	The Old Chester Hotel site.				X
H-8	The Blunt House			X	
H-9	Confederate Cemetery in West Hill Cemetery.		X		
H-10	Emery St. School		X		
H-11	Fort Hill (historic location)		X		
H-12	Dug Gap Battle Park		X		
H-13	Blue Mountain				X
H-14	Mill Creek Gap (pocket park on US Hwy 41).		X		
H-15	Disney Trail and defenses on Rocky Face Ridge			X	
H-16	Prater's Mill		X		
H-17	Tunnel Hill		X		
H-18	Clisby Austin House			X	
H-19	Resaca Confederate Cemetery			X	

Tourism Readiness Summary

What does "tourism readiness" rankings mean?

The ranking numbers:

1 – Fully tourism ready for bus tours and larger numbers of visitors. Has restrooms and related visitor services available. The site has regular posted hours/seasons of operation.

2 – A type 2 ranking means that the site can handle moderate numbers of visitors at one time, such as a van load of 10 visitors, or up to 20-30 visitors at one time. Way finding signage is usually posted and some limited visitor services are available. The site has regular posted hours/seasons of operation.

3 – A type 3 ranking means that the site has very limited hours of operation, as well as limited parking and visitor services. It usually has visits "by appointment only". It is available for "drive by" interpretation or "walk-by" interpretation in that it may have a historical marker associated with it.

4 – A type 4 ranking means that this site is not recommended for heritage tourism marketing for on-site visits at this time. It may have no formal hours of operation, has limited parking and no visitor services. It may/may not have a historic sign associated with it. Recommendations are made for its future tourism readiness.

This ranking system has a "subjective" basis built in and is open for discussion. The rankings noted in the Assessment Form takes into consideration a variety of elements, and in some cases a site may border between two ranking systems.

Ready to develop your tourist products?

When we are done with all this we are ready to plan, design and produce our tourism products to be made available at tourist information centers, hotels, restaurants, historic sites, and other related tourism outlets. Some of the media for the **total Landscape Museum** we develop can include:

* Self-guiding driving tours (themed to different topics and "galleries" driving times, etc.)

* Audio driving tours (CD for car systems with map and driving directions map/guide book).

* Cell phone interpretation (keyed to the guide book or at individual interpretive stops on panels or information kiosks).

* General Landscape Museum guide book – souvenir quality with photos, contacts, web sites, etc.

Summary

Our potential landscape museum exhibits are found all round us – our historic sites, natural areas, battlefields, museums, and other wide-ranging "galleries" waiting to have their stories "linked up with related sites" and revealed to us. This is a concept ready for scenic byways, national heritage areas, and future looking tourism experts. Let's develop all of our heritage stories in our local Landscape Museums and let our visitors know just why we feel our home towns and communities are so special. This is a concept whose time is here. It's time to think LARGE.

Chapter 7 -Creating "Real Interpretive Writing - connecting interpretive planning objectives to media.

So why the title "real" interpretive writing? Not too long ago I was contacted by a Metro Park that was in the process of designing a new interpretive center. They had the concept design done along with the "interpretive writing" for the exhibit copy. But they weren't that happy with the writing and asked me to have a look at it.

Where was the interpretation in the interpretive writing? That was the problem. The "interpretive writer" hired by the exhibit company was an interpretive writer in title only. The writer had no training at all in interpretation, never heard of Tilden's Interpretive Principles, and no idea how to use these principles in developing copy. The labels were "informational" – but not interpretive. So we spent two weeks re-writing all of the copy to have provocative headers, use interpretive principles, and be based on objectives. Also research tells us that copy on museum exhibits has to be 50 words or less, and other copy can be added in a headline format – 50 words of main text, then in smaller point size, some additional supporting copy. I just recently had another discussion on "interpretive writing", so I was motivated to share some principles and examples of what I think actually is "interpretive" writing, based on Tilden's principles and related interpretive concepts.

Tilden's Tips for developing great copy – the rests of the story!

When I was teaching interpretive writing as part of my Introduction and Advanced Interpretation Courses at Michigan State University the best book I found for truly interpretive writing was Paul Harvey's Rest of the Story. This collection of amazing vignettes was outstanding examples of using Tilden's principles of:

Provoke – the attention and curiosity of the reader.
Relate – to the every-day lives of the readers.
Reveal – the main point of the writing through a unique or creative viewpoint. Save the answer for last and have a "wow" factor of surprise to it.
Address the Whole – the copy should address the total theme of the site, exhibition or facility.
Message Unity – use the right vocabulary, colors, fonts, etc. to support the theme and topic.

So let's get started. On the next page is a sample interpretive text for a self-guiding walking tour in a historic district. See if you can spot the provoke, relate, reveal and the rest of the TIP's.

The Jackson Clubs Dark Secret.

In 1842, this was the location of the *Jackson Club*, a club, for **Men Only**! This was the place where the elite of Jackson came to do business, visit, and talk about the news of the times. And becoming a member wasn't easy – you had to be somebody important!

Mike Sommerville was somebody*! Arriving in Jackson in 1843, he quickly developed a reputation as a powerful businessman, and was invited to become a member of the Jackson Club. Mike served two terms as club president, and even helped increase the membership of this Men's only organization. A proud member for 25 years, it wasn't until Mike's death in 1869 that it was discovered --------- that Mike was really …* ***Michelle – Yep! A Woman!***

Your next stop on the tour is just one block down this street on the right, a large white home, number 321. It looks like an ordinary home, but there's an extraordinary story buried in the garden. I'll meet you there with a shovel.

Was there an "AHH" at the end of the story? The REVEAL! Notice how after the reveal for this stop on the tour we **"re-provoke" for the next stop on the tour.** Well written self-guided tours are a series of Provokes, Relates and Reveals – all stops illustrating the main interpretive theme.

The "**Address the Whole**" would be the main theme that connects each of the stops.

The **Message Unity** will be the verbal connection and analogies used throughout the written tour guide, the color and type style of the paper and the visual support of the brochure design.

This tour could also be a written script to be used for smart phone interpretation as well.

Do you think that this would be a fun tour to take with all of the stops being provocative and revealing? Good interpretive writing should be enjoyable as well as powerful and even memorable – and accomplish its objectives.

Using Tilden's Principles for Interpretive Writing. Tangibles, intangibles and universal concepts.

As part of the use of Tilden's principles for interpretive writing, we should also consider how we might use the strategies of "tangibles, intangibles, and universal concepts" as we develop our writing projects. David Larson in his book "Meaningful Interpretation" talks about these concepts and we should introduce them to you here is you are not familiar with them. They are key to effective interpretation, weather used in live programs or written text or scripts.

Tangibles in interpretation: Tangibles can be objects, places, people, events, landscapes or other related materials. So if you are writing the text for a self-guiding booklet on seasonal wildflowers, some of the tangibles might be:

- the species of flowers visitors will see.
- the insects that might be part of that flowers life cycle.
- the uses of those flowers in art, folk art, medicine or other uses.
- the ecological needs that those plants have for survival.
- threats that might occur to engender them.

Intangibles in interpretation: Intangibles are things that you might feel emotionally than feel physically. They can be ideas, memories, relationships, and values. So for our text for the self-guiding trail booklet, some of the intangibles could be:

- Happiness or relief a early settler might have had in finding a plant that could cure an illness.
- Remembering your parents gardens back home.
- Feeling relaxed when you walk through a garden.
- Marveling at the beauty of a flower.
- Remembering your mothers favorite flower and the joy it gave her.
- Smells that rekindle memories or feelings.

Universal Concepts: These are concepts that everyone can relate to. When I was taking my very first interpretation class at Ohio State University back in 1976 my interpretation professor Dr. Gabe Cherem called them "cross cultural puncture points". What goes around comes around under a new name. They are concepts that no matter who you are or where you are from you can relate to:

- Wedding ceremonies
- holiday celebrations
- the concept of "home"
- religion
- death and disasters
- Can you think of other examples?

Universal concepts are often hidden in, or a part of our intangible concepts.

So for our text for the following self-guiding trail stop example, some of the Universal Concepts could include:

- Many of our medicines come from plants.
- Plants are an important part in funerals in many cultures.
- There are many reasons people brought plants to patients in hospitals and sick rooms.
- Plants have always been an important of everyone's diet.
- No matter what your favorite food is, there is probably a plant linked to its story.
- Some plants can save your life in unusual ways.

So now that you have the parts of the story, your job as a writer would be to link them together to provoke, relate and reveal, using tangible, intangible and universal concepts.

Let's look at the copy for one stop on a self-guiding plant tour for a natural area.

Cat got your tongue? Well, this cat could save your life!

At least its *tail* could. You probably know this plant as a **cattail**. If you were a muskrat, cattails would be used to make a nice lunch and a cattail constructed home – built just a little different from your home probably but for the same reasons. You can see their homes in the marsh here looking like small beaver lodges.

How can they save my life? In a survival situation (they taught me this in the Army), you can make a pancake type of batter from the cattail head pollen, eat the cattail roots (taste like cucumber), use the fluff in the autumn to start fires from sparks, and weave the leaves to make mats to sit on. Not too bad for one plant.   So you see, ***here's another example of how our lives can be connected to plants in some amazing ways.***

Can you find the elements of Tilden's TIP's and the tangible, intangible and universal concept?

- One tangible is the cattail itself, another is the muskrat lodge.
- One intangible is the concept of home, another life saving.
- Universal concepts – home, and plants can save lives.

Provoke: This cat could save your life:
Relate: muskrat homes are different from yours but use for the same reasons.
Reveal: How this plant can be used in a survival situation.

Address the Whole: Theme of the self-guided walk –

All of our lives can be connected to plants in some amazing ways.

Message Unity: graphic/photos and play on words.

As part of the planning for your text you must also consider:

- Who is your audience? Will your examples, vocabulary, intangibles, etc. be able to relate to them?

- Identify your theme. In our example above, the theme for the total self-guided brochure was: ***All of our lives can be connected to plants in some amazing ways.*** This theme would be re-stated again at each stop in the guide to reinforce the concept.

Writing for feeling and imagination – the power of words.

Now that we have had a good review of interpretation and the structure that your writing needs to follow to be "interpretive", let's start to tease apart interpretive writing into its potential parts.
Of course interpretive writing needs to provoke, relate and reveal, have message unity and address a main theme. Here are some techniques to do just that to make your active language more memorable and powerful.

Active Verbs. In developing text, active verbs can make your text more powerful. Here are some examples.

a. The lizard *crept* up the leaf.
b. He *cringed* when he saw it.
c. The snail *munched* on the leaf.
d. The bird *soared* to the heavens.

Colorful Nouns. These are people, places or things. Here are some examples of nouns.

Aunt, uncle, grandfather, grandmother
Brother, sister, boy, girl.
Bedroom, bathroom, kitchen, living room.
Broom, mop, vacuum, waste basket; faucet, hairdryer, toilet, toilet paper; toothbrush and paste, towel, pillow, mirror.
Cup and saucer, dishwasher, paper towels, refrigerator.

Personal words. We try to use these in interpretive writing. We want to have our writing be a conversation with the visitor, rather than talking at the visitors. Personal words include:
You, us, she, you guys, we, all of us, together,

Powerful adjectives:

An **adjective** modifies a noun or a pronoun by describing, identifying, or quantifying words. An adjective often precedes the noun or the pronoun which it modifies. In the following examples, the **highlighted** words are adjectives:

The **car-shaped** balloon floated over the treetops.
Mrs. Smith papered her **living room** walls with **hideous** wall paper.
The **large** boat foundered on the **wine dark** sea.
The **coal** mines are **dark** and **dank**.
Many stores have already begun to play **irritating Christmas** music.
A **battered music** box sat on the **mahogany** sideboard.
The back room was filled with **large**, **green rain boots.**

Remember that “interpretation” means translation. In interpretation we translate from the language of the expert to the language of every day visitors. Some of the best ways for this translation and understanding of the concept or idea being interpreted is the use of **Metaphors, analogies, and similes** in our written and verbal interpretation. Here are some examples.

Metaphor. A figure of speech in which an implied comparison is made between two unlike things that actually have something in common.

Some people think of metaphors as nothing more than the sweet stuff of songs and poems--Love is a jewel, *or* a rose, *or* a butterfly. *But in fact all of us speak and write and think in metaphors every day. They can't be avoided: metaphors are built right into our language.*

Some metaphors are so common that we may not even notice that they *are* metaphors. Take the familiar metaphor of life as a journey, for example. We find it in advertising slogans:

- "Life is a journey, travel it well."
  (United Airlines)
- "Life is a journey. Enjoy the Ride."
  (Nissan)
- "Life is a journey. Enjoy the ride with a GM reward card."
  (General Motors)

We use metaphors in poetry all the time – remember Robert Frost’s -
Two roads diverged in a wood, and I--
I took the one less traveled by,
And that has made all the difference
("The Road Not Taken")

And a few more just for fun:

- "Love is the wild card of existence."
  (Rita Mae Brown, *In Her Day*)
- "Love is a homeless guy searching for treasure in the middle of the rain and finding a bag of gold coins and slowly finding out they're all filled with chocolate and even though he's heart broken, he can't complain because he was hungry in the first place."
  (Bo Burnham, "Love Is")
- "Before I met my husband, I'd never fallen in love. I'd stepped in it a few times."
  (Rita Rudner)

You may not know it but metaphors are a common part of our language that we use every day. In interpretive writing, we try to use it on purpose because it is the right example to express the concept we are presenting and hoping to have visitors understand and remember.

Analogy. An analogy is "reasoning or explaining from parallel cases." Put another way, an analogy is a comparison between two different things in order to highlight some point of similarity. As Freud suggested, an analogy won't settle an argument, but a good one may help to clarify the issues. Here are some examples.

"Pupils are more like oysters than sausages. The job of teaching is not to stuff them and then seal them up, but to help them open and reveal the riches within. There are pearls in each of us, if only we knew how to cultivate them with ardor and persistence."
(Sydney J. Harris, "What True Education Should Do," 1964)

"Do you ever feel that getting up in the morning is like pulling yourself out of quicksand? . . ."
(Jean Betschart, *In Control*, 2001)

"Ants are so much like human beings as to be an embarrassment. They farm fungi, raise aphids as livestock, launch armies into wars, use chemical sprays to alarm and confuse enemies, capture slaves. . . ."
(Lewis Thomas, "On Societies as Organisms," 1971)

In interpretation we often say that an ecosystem is like your own community, different kinds of houses and building, edge effects (building codes), and all inter-related.

A habitat is analogous to your own home – you need shelter, food, water to survive too, just like the plants and animals that live in this habitat.

And finally the use of Similes. We use the terms *like* or *as in* similes. Here are some examples.

as alike as two peas in a pod
as bald as a coot
as big as a bus
as big as an elephant
as black as a sweep
as black as coal
as black as pitch
as blind as a bat
as blind as a mole
as bold as brass
as brave as a lion
as bright as a button
as bright as a new pin
as busy as a beaver
as busy as a bee
as busy as a cat on a hot tin roof

Try your hand: As useful as ________________________ !

How many of these have you used recently? Look at interpretive writing, text for interpretive panels, exhibit labels, or scripts for other printed or spoken narratives. They can make the concept presentation more interesting and fun.

Now let's see how **active language** might be used in an interpretive text. See if you can spot any of these active languages in the following copy as well as Tilden's principles of Provoke, Relate, Reveal, Address the Whole, Message Unity.

This copy was written by J. Veverka as part of audio interpretation for **Red-winged blackbird** interpretation for the Red-winged blackbirds that were nesting in a local wetland. The audio included Red-winged blackbird "songs" in the background – sounds of wind, etc. as part of the message unity.

Auditioning for a legacy.

It's mid-May and spring has finally returned to the marsh. It has been a long journey and they're weary - waiting for the electrified air that will once again signal the start of what has occurred here thousands of times before. As a poet waiting for inspiration – they too wait. But their play will begin soon.

Finally the curtain rises, the centuries old rites of courtship begins and males fight for territory with their songs and displays, auditioning for their potential drab mates. Their new domains will be defended like a knight protecting their castle, except their castles are made of cattails and reeds. The time for renewing the flock has arrived.

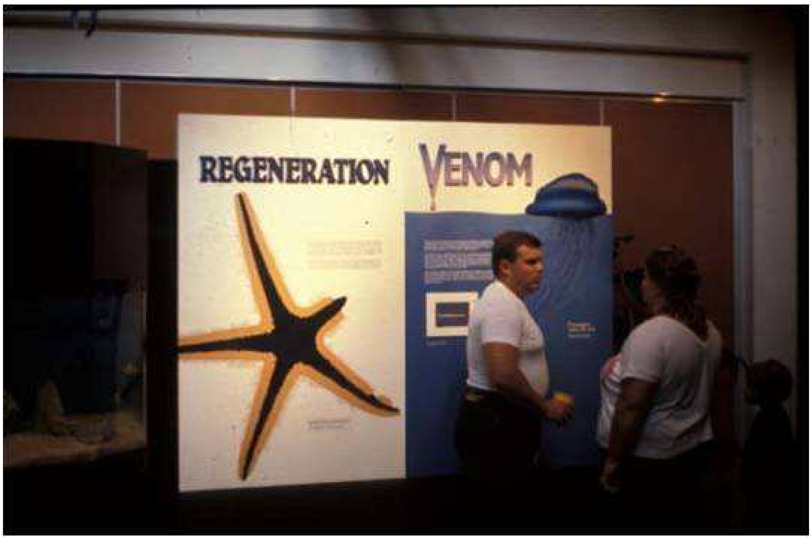
But the months soon quickly pass and are forgotten like our morning dreams and the skies begin to darken early. Leafs take on a new personality and the winds reveal their true nature as the chill of October engulfs the once friendly marsh.

The young are grown and gone from the nests now and once prized battle grounds are suddenly left abandoned. Soon the sky will be briefly filled with their legions, like winged clouds heading for warmer lands. But lingering within each will be the map and desire to return home where the cattails and reeds of a spring marsh once again await their arrival and their ageless play to be auditioned and presented for a new audience - the legacy of the Red-winged blackbirds renewed once again.

See if you can identify the different uses and types of "active language" used in this copy.

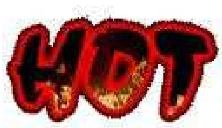
When is a word a picture?

As interpretive writers we also look at the word design themselves, how to connect them and empower them to do more than just be a sound. But how words look can be an important part of interpretive writing. Let's look at some examples of using words themselves as part of our interpretive message unity.



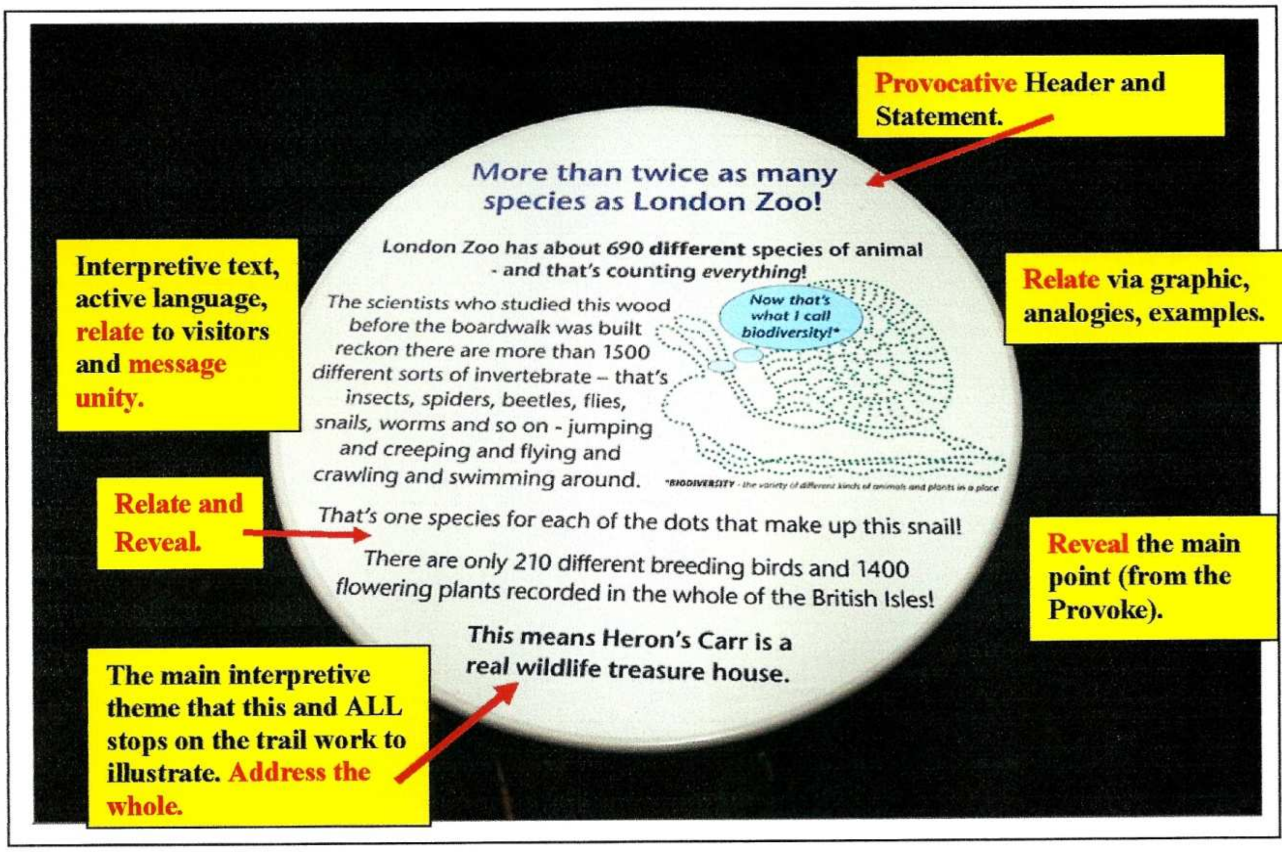
Look at the word ***Venom*** in the exhibit above. Note how the planner had the "word" venom, **look like** venom. It even drips!

Here are more examples of how you can use different fonts to have your words be more than words and be part of the message unity for the total presentation



So remember, when you are writing interpretive label copy, developing text for an interpretive exhibit or other interpretive projects, the words you use can be "more" than just words. The word design can also convey humor, memories, sadness, feelings, and more.

Finally, let's look at one final example of interpretive writing for a panel noting how interpretive principles were used in developing the copy/text.



So are you ready to put interpretation in interpretive writing? Now you know a little bit more about this skill and understanding of interpretive principles. As an evaluation tool, look at any of your current "interpretive writing" (exhibit labels, outdoor panels or publications) and check it against:

- Where is the provocative header and other use of provocation?

- Does the copy use RELATE principles in its presentation?

- Is there any "REVEAL"?

- Was the main interpretive theme clear or was this just **Wikipedia on a Wall**?

- How was "message unity" used in the presentation (fonts, etc.)?

- Were the objectives of the writing clear and obvious – did it have any objectives?

10 Tips for hiring an Interpretive Writer.

If you're looking to hire an interpretive writer, or an exhibit company says they will provide one for the project, here are some suggestions of questions to ask, and evidence review.

1. Where did the interpretive writer get their training specifically in interpretation?
2. Have they had any training specifically in interpretive writing?
3. Ask to see samples of interpretive writing asking them to specifically explain or illustrate just how they used interpretive principles, tangibles and intangibles in the copy.
4. Ask for a copy of the objectives that the interpretive writing was to help accomplish.
5. Ask for samples of interpretive writing directly related to your project (museum exhibit labels, interpretive panels, audio scripts, etc.).
6. Ask them if they are aware of research in interpretive writing (length of text for panels, exhibits, etc. and what is the research saying is the best point size for the copy being presented). For example, not more than 100 words at 30 point size for the main text body for outdoor interpretive panels.
7. Ask them how they might "pre-test" any of their copy to see if the visitors understand it and their objectives are being accomplished?
8. Ask them how interpretive writing is different from other forms of writing.
9. Ask them how they will incorporate your interpretive theme into the copy development.
10. Ask them how they can incorporate your interpretive objectives into the copy development.

I think that should help you find a really great and actual interpretive writer.

In summary

Interpretive writing has to actually be interpretive – use Tilden's Interpretive Principles, Tangibles, Intangibles and Universal Concepts in its development. Interpretive copy is more fun to read and engages the imagination of the visitors while injecting some "inspiration" as well. It is why interpretive writing is used in headlining on AOL and in TV commercials as well. Interpretive writing is "outcome" based. That means its objectives are accomplished. For great examples of real interpretive writing check out "Paul Harvey's Rest of the Story" – with his many "interpretive" writing examples. Check out this link to hear Paul Harvey "Rest of the Stories" and the REVEAL at the end of each: http://archive.org/details/TheRestOfTheStory.

Chapter 8 - Creating Marketing Plans as part of Interpretive Planning.

Without a doubt *marketing* is one of the most critical aspects of any heritage or interpretive attraction operations. Marketing brings in visitors – and gets them to come back for return visits. Successful marketing efforts = staying in business for most heritage attractions, particularly those not totally supported by local governments or other governmental agencies. But one of the most surprising things to me is, given how critical a "professional" understanding of basic marketing principals are for any heritage attraction, is the lack of understanding of what marketing actually is and "how to do it" that exists through out the heritage tourism industry. One example of this that I see often involves marketing brochures. During frequent marketing courses I make the statement to the participants that they have probably spent thousands or tens of thousands of dollars in the design, production and distribution of marketing brochures (the kind you see at every tourist information center), and yet they have no proof that they work! How do you know that these pieces have made any money for you – that they actually brought in enough new visitors to "pay for the printing and distribution costs of the piece themselves"? This usually generates an audible "GULP" from the audience, as most heritage attractions don't have a clue if their marketing materials and efforts actually work – no tracking or evaluation process. This is particularly common with medium and smaller sized heritage attractions.

What is "marketing" anyway?

We spend our lives seeing so much of it, television, radio, web sites, etc. We are surrounded by it. Marketing is like the word "ecology" – a nice word, but most people have never seen an "ecology". So let's use a working definition of "marketing".

> *Marketing is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, and services to create exchanges that will satisfy individual and organizational objectives.* – (From "Introduction to Marketing by M. Cooper and C. Madden).

In simple terms, heritage tourism related marketing is "**successfully**" communicating with and convincing potential visitors that you have something that they need or will benefit from, and that you can provide a service or fill that need better than anyone else.

And Where Is the Visitor in all of this – EVERYWHERE!

Another aspect of marketing problems is that many heritage organizations and attractions have little or no visitor-based information to work from. They don't know who their markets are! **Marketing is ALL about completely understanding your audience (current, or intended).** So in reality, many marketing pieces, from brochures to advertisements in magazines, fail due to a general lack of understanding about their intended visitors and the psychology of the visitors. Brochures often simply illustrate or promote the wrong things. For example, a hotel or motel brochure may show nice photos of the bedrooms or dining area, but what a visitor may really want to know is if that hotel or motel is "near" any attractions or other services. Developing a marketing plan followed by marketing materials such as brochures or print advertisements, requires that we know the answers to some (all?) of the following questions about our visitors:

Existing Markets to our sites or attractions

- Where are our visitors coming from?
- What are their age groups and other socio-economic backgrounds?
- How long does the average visit last?
- Is there a visitor perception that the admission fee was good value for the experience paid for, or do they think they paid too much for to little?
- What did they spend money on – and how much?
- What were the attraction visit components (shopping, food service, interpretive experiences, social interactions, recreation opportunities, etc.) of most importance to the visitors?
- What were/are their seasonal visitation patterns and influences?
- Why did they decide to visit the site or attraction in the first place?
- What experiences or recreational learning opportunities were they looking for?
- Did the site/attraction meet or exceed their "**expectations**" of what they would see-do-and experience here or did it "fall short" of the visitors expectations (from marketing brochures and related advertising)?
- What were their best or most powerful "memories" of their visit?
- What reasons did we give them to return again to this attraction?
- What is the attractions "physical and psychological carrying capacity" and did we exceed it? Were we too successful in attracting visitors and couldn't give visitors a quality experience because of too many visitors?
- Could our support services handle our visitor load?

- Was our on-site experience (the visit) as good in reality as our marketing pieces "made it look"?
- Did our "customer care" plan/training pay off – did the visitor "feel" welcome?

These are some of the questions that need to be asked and answered in developing a marketing plan, and marketing materials for "current visitors" or market groups.

Market creation – generating new market groups.

The next aspect of developing heritage tourism/attraction marketing plans and materials is the issue of **market creation.** This is the answer to the question I often ask clients - "we know who your visitors are – but who do you want your visitors to be?" Market creation is generating new visitors or market groups to come to your site. For example: more school groups; more local visitors or community residents; special interest groups such as photographers, bird watchers, historical architecture buffs, railroad buffs; more retired visitors, etc. Here are some of the questions to be answered in developing marketing strategies and materials for these *potential* visitors (market groups):

- What specific new target markets would be interested in the stories, materials, experiences, artifacts, etc. that our site offers?
- What would we promote as the BENEFITS for these new market groups to coming to our attraction? What's in it for them by coming to our attraction?
- Would these be seasonal market groups? If so, which seasons?
- How do we contact these new market groups (advertisements in specialty magazines or publications, mail outs to clubs and organizations, E-Mails to specialty organizations membership lists, etc.)?
- Do we have the support services in place to handle a surge in visitation (parking, staff, food service, volunteers, etc.) if they show up?
- How do we design and structure our advertising materials to get the attention of, and RELATE to these new market groups? Do our marketing materials have photos with "people" in them? Are there photos of our intended market groups in our marketing pieces? What are the people in our marketing piece photos doing?
- How will we track and evaluate the success of our market creation plan?
- Will we need to do some site re-design or additions for these new market groups (such as adding "baby changing stations" in restrooms if we are trying to attract families with very young children)?

- Are these new market groups “renewable” (want to come to the attraction more than once) or are they one-time visitors only (as the market groups might be for attractions located along interstate highways)?
- How have other attractions done that cater to or try to attract these same market groups? What has been the key to their marketing success? Were they successful?

You can see that there is overlap in considering these questions, as you may be marketing to both groups (current visitors as well as trying to attract new or different market groups) at the same time. The question arises as to “how you can do any real marketing efforts at all without knowing the answers to most of these questions”? This is why some existing marketing pieces can “look great but not work”. They may be giving answers to questions that your main market groups “aren’t asking”, and not answering the questions that they are asking. And no one knows this is going on.

What should be in a Marketing Plan for Heritage Attractions?

Here is a general outline for use when developing or teaching courses in Heritage Tourism Marketing. Feel free to add or modify this outline to suit your specific needs:

Marketing Plan Basic Outline for Heritage Tourism Sites and Attractions

A. Objectives (what do you want this plan to accomplish?).
   1. Learning Objectives
   2. Emotional Objectives
   3. Behavioral Objectives

B. Product(s) Analysis (what are you selling?).
   1. Experiences (experience and memory mapping and analysis).
      a. Passive Experiences
      b. Active Experiences
      c. Psychological immersion
      d. Physical immersion
      e. The experience mix.

   2. Physical products (books, trail guides, guided tours, videos, etc.).

C. Current Market Groups (Macro and Micro) analysis. (Who are your current visitors, where are they coming from, etc.).
   1. Current visitor demographics (any existing research available?).
   2. Seasonal visitation patterns.
   3. Visitor expectations and motivations for visiting your site.
   4. Customer care needs (handicap accessibility, food service, etc.).
   5. Market mix sustainability (school groups, out of country tourists, etc.).
   6. Visitation patterns (increase or loss) over the past 5 years.

D. Critique of current marketing/advertising strategies (do the work – how do you know?).
   1. Current advertising plans and ad placements (what magazines, etc. and why).
   2. Current brochure and brochure distribution.
   3. Other advertising materials.

E. Market Income Stream.
   1. Cost per contact.
   2. Cost Effectiveness
   3. % of total budget from admissions and gift shop sales, etc.

F. Competition Analysis
   1. Other near-by like attractions or sites with similar services and experiences.
   2. Other attractions in your area (their visitation numbers, seasonal visitation patterns, target market groups, etc.).
   3. Potential for developing partnerships (joint admission tickets, etc.?) with near-by attractions?

G. Market Creation
   1. Which new market groups do you want to try to attract?
   2. What benefits can you offer them by visiting your site or attraction?
   3. What promotion or advertising strategies will you need to communicate with them and tell them about your site and services?
   4. Where and how to make the most powerful first contacts.

H. Marketing Campaign
   1. Budget allocations based on need.
   2. Advertising material design and pre-testing.
   3. Ad placements and tracking strategy.
   4. Web Site Development

I. Advertising Strategy (consolidated from other sections above).
   1. What, when where, media selections, costs, etc.
   2. Ad mix designs and pre-testing.

J. Implementation of the Marketing Plan.
   1. Time Lines for implementation.
   2. Budget determinations per ad line item.
   3. Staffing needs.
   4. Contracting needs.

K. Tracking and evaluation of the ad campaign. On-going evaluation to see how the advertising is going month by month.
   l. Tracking reviews (schedule, etc.).
   2. Evaluation tools, and on-going evaluation (monthly?).

Again, this is a general "content" outline for a complete marketing plan. Feel free to add or change this as best fits your particular needs.

New theories and concepts to be thinking about when developing your marketing plans and strategies.

A lot of new and exciting theories and practices have emerged recently that greatly affects how we do heritage tourism planning and marketing. Some of these new ideas and concepts include:

- Markets of One
- Mass Customization

These concepts involve learning how to mass produce yet individually customize goods or services, with major implications for heritage tourism planning and marketing, particularly for large heritage interpretation areas and heritage corridors, but also for helping to plan programs and services at museums, parks, historic sites and related attractions.

- Experiential Marketing

What visitors are looking for are "experiences" – this is a key concept in developing and marketing for any heritage/interpretive attraction. What experiences does your attraction offer – how powerful are the experiences? How memorable? Marketing pieces need to **illustrate** the kinds of or range of experiences your site offers. Check out the "reference" listing of this article for good books on ***experience marketing***.

- Memory Mapping

  When I do interpretive master planning for heritage/interpretive sites and attractions I now look for (and plan for) where the best and most powerful *memories* of the visit will come from (or need to be created). Where will visitors want to have a photo taken of them standing next to? What will they take pictures of? What do you want them talking about in the car on their way home from visiting your site? What memories (souvenirs) enhancements will you have available (post cards, T-shirts, videos, photo opportunities)? Why do you think Disney goes out of their way to make sure you and your children can have photos taken with the various Disney characters when you visit Disney World?

These are just a few of the new heritage tourism/interpretation marketing ideas that we are now using in developing marketing plans and marketing materials.

Don't even think of not pre-testing your marketing materials!

Finally, when you have competed your thought process and answered all of the questions about your audience, and designed your various marketing pieces, there is only one person(s) who you should ask to see "what they think" of them – the people the marketing pieces were planed for. They will tell you, through pre-testing of the materials, if they like or understand them. This evaluation process is very important – why would you want to spend thousands of dollars on something if you have no proof that it works? Remember:

- Don't just ask the people who designed the marketing pieces if the brochures or ads are "good" or will be successful (guess what the answer will be).
- Don't just ask your staff members if the marketing pieces are "good" or will be successful – they have no way of knowing.
- Don't just ask the Board of Directors what they think (that will take forever and they won't know if the pieces will be successful either).

The only reliable people to ask if the marketing pieces are good, or have any chance of generating a visit are the potential visitors the marketing pieces were intended for. Ask them!

Then and only then will you know for sure if the marketing materials and communication approaches really do “connect” with those visitors.

Summary

It was the goal of this short paper to give individuals involved with the marketing of interpretive/heritage tourism sites and attractions some “things to think about” when developing a marketing plan, and particularly in developing marketing materials. The main point is to remember that everything involving marketing is about the visitor. If your marketing materials don’t “connect” with them, the visitors won’t show up at your attraction. Marketing is something that requires a level of professional understanding about it, and a deep understanding of such topic areas as:

- The psychology of the audience.
- Visitor motivation and expectations.
- Recreational learning theory.
- Consumer behavior.
- Interpretive communications.
- Psychology of Interpretive Design
- Marketing research techniques.

With the ultimate success of most heritage attractions centered on how that attraction is marketed – it is well worth the investment in time and staff to do it right the first time.

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Chapter 9 - Training and coaching interpretive staff as a part of interpretive planning needs.

Sometimes teaching an interpretive training course or workshop can be a bit daunting. Here you are – a professional interpreter- surrounded by other professional interpreters, all waiting to hear what you have to say, learn or improve on a new skill, get a shot of enthusiasm, or more than likely, all of the above. So how does one prepare to plan, design and present a "successful" interpretive training course or workshop? After 27 years of doing interpretive training courses, from university teaching to providing interpretive training for agencies worldwide, here are some things that I learned over the years that can really help make training courses a success.

Planning for training.

The first step.

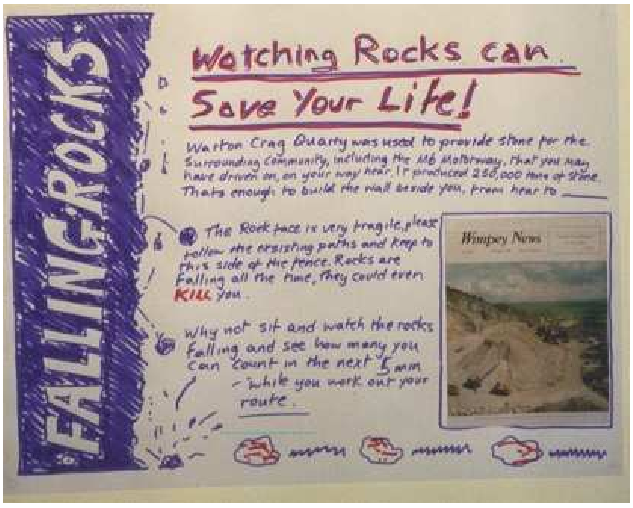
When beginning to plan your training course the first thing to consider is exactly what you or your client want the training to accomplish. What information, skills or improved abilities is the training supposed to accomplish? To this end, I begin with working out just what the measurable objectives of the training are:

- Learning objectives. What information do you want the participants to remember and why?
- Behavioral objectives: How will the participants USE the information. What skills will they be able to demonstrate after the training is completed?
- Emotional objectives: How will you make the training fun – and fill the participants with self-confidence and enthusiasm?

The Pre and Post Test and measuring training success.

With objectives in hand, I often create a workshop pre-test (testing against the objectives of the workshop). I want to know how much the participants already know about the subject matter – do they already know Tilden's Principals for example? With the post test (same questions as the pre test) I can measure the change in knowledge that occurred based against the pre test scores. The pre and post testing is one of the only "real" ways to measure success of the training.

The other way to measure the success of the training is by **practicum and products**. For example, in interpretive panels planning courses I have participants actually develop interpretive panels. In the course they are walked through the interpretive planning process for their project (objectives, theme, use of Tilden's principals, etc) to develop a mock-up panel like the one shown below.



It is the goal of practicum's such as the panel exercise, to see if the concepts presented in the training can be turned into real products. This is one example where it is easy to see that this participant really understands the concepts and was able to put them to use.

Course Objectives and Evaluation strategies – what next?

With my course objectives in hand, the next step in putting together the training is to have an understanding of the participants. What skill or information levels do they currently possess? Will the workshop be one teaching skills that they will be using immediately when they return to their own sites? Or will the training be for other kinds of information that they will use later on?

Teaching Aides?

After considering the course objectives and the audience, the next thing I usually think about is what teaching aides will be needed. Will I need a course textbook or manual, handout materials, overhead transparencies, completed media examples, guest speakers, AV or videos, or other teaching aides? I begin by lining up the objectives and subject matter I am planning to present with what I think I will need to use to provide visual and audio examples of the concepts.

Lesson Plans Anyone?

Depending on the length of the course (one day or 5 days – or a semester) I like to develop lesson plans. Lesson plans are a way for me to outline – on paper – the objectives I want each workshop session to accomplish, the activities that I will be doing, and any associated teaching aides that will be required. I can also send the draft lesson plans to the agency representative I am doing the training for to make sure that all of their objectives and outcomes are there.

A sample lesson plan page for an introductory interpretation course is presented on the following page.

Session objectives and outcomes.

As part of the workshop planning process, we must have training objectives for each workshop session we plan to present – these appear on the lesson plans as well. For example: ***As a result of this session, all participants can write at lease one example of a learning, behavioral and emotional objective.*** That means that for this particular workshop session, the instructor has to present the information, give examples of each type of objective, and have a practicum where each participant writes one example of each objective type.

All workshop sessions should have objectives, which relate to the overall objectives of the total workshop session, and relate to the workshop pre-post test exam questions. Again, these would appear on the lesson plans to guide the instructor as to how to best “illustrate” the concept the objectives are relating to.

The lesson plan page below illustrates one page of a 22-page lesson plan set. You can see how the session objective is presented and the first exercise used to illustrate learning concepts and principals is laid out.

Day: 1 | **Subject: Interpretive Services**

Time	Lesson Details	Visual Aids
	Objectives: Upon the completion of this topic, each student will be able to describe three learning concepts and three learning principles. *Learning Concepts* This section involves several hands – on learning activities with instructions as to how to conduct each activity. *Exercise #1* Begin by using the Beatles CD. This CD has two versions of the Beatles song – the original version, and a "classical" version of the same song (I Want To Hold Your Hand). First plan about two minutes of the "classical" version (the first section on the cassette tape). 1. Set up the tape so that it is ready to go at the beginning of the class session with the classical version first. 2. At the start of this exercise tell the students that you want them to listen to this piece of music and to write down whatever the music makes them think of or feel. Also, if they know the name of the composer, write that down too.	Beatles CD Flip chart pad for recording responses

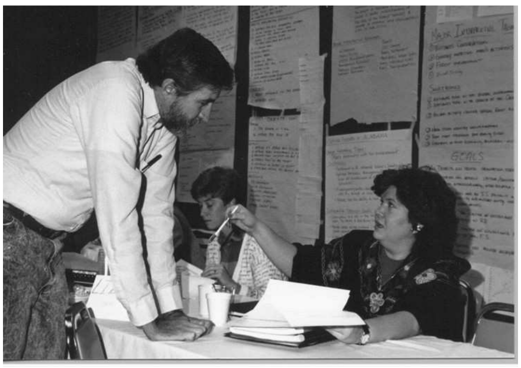
One of the key parts of any interpretive training program is the "hands on" or practicum part of the course. In general, people remember:

- 10% of what you hear;
- 30% of what you read;
- 50% of what you see;
- 90% of what you do.

With this in mind I like to develop lots of hands on activities as part of the training courses. I want participants to take home "products", not just information. For example, in a training course on interpretive program planning I have participants divide into groups of about 4 people each. Give them an interpretive program theme and objectives, and about ½ hour to plan and rehearse a 5-minute presentation to the group. The presentation must:

- Illustrate the theme.
- Accomplish the stated objectives for the presentation.
- Consider the audience the presentation is presented to.
- Use interpretive communication principals (provoke, relate, reveal, etc.)
- Involve the audience (some or all) in some way.

Thus, the practicum is the culmination of the training course, where the theory and ideas are turned into real products.



For participants in a "Interpretive Master Planning" course, their practicum was to actually develop (over 3 days) an interpretive plan for their own site. The walls behind them are covered with their objectives, themes, site resource inventory and interpretive planning forms. They will go back to work with a solid working draft interpretive plan – and the skills needed to

Planning for Training Summary

So in general the basic steps I use in planning for my training courses are:

- Understand clearly the objectives of the training course.
- Understand your audience.
- Have an evaluation strategy (pre-post test, practicum projects, etc.) to see if the training objectives are accomplished at the end of the workshop.
- Think through the kinds of teaching aides you will need.
- Develop a detailed lesson plan to help you plan your presentations.
- Make sure that there are lots of “hands on” learning experiences.
- Use interpretive techniques to actually present or “interpret” to the class yourself.
- Make sure that the participants have fun and leave with more than just information.

That Art of Critiquing and Coaching Interpreters.

Interpretive Coaching and critiquing is often a process where the presenter, if they know they are going to be critiqued, are a nervous mess. No one really gets in line for the joy of having their program or guided tour critiqued. Not even me. When I was a seasonal interpretive naturalist with Ohio State Parks, knowing was going to be critiqued by the Regional Interpretive Specialist made for a long day – waiting for the white State Van to pull up. Yikes. But the evaluator turned out to be a coach – and that made all the difference in the world

Now, 30+ years later, and being the one often asked to come to a parks, museum, zoo or other site with interpreters, and do a interpretive program or activity critique, I remember that first I must be an interpretive coach. Critiquing is a process by which interpreters are helped to present the highest possible quality of programs to the public. On-going coaching helps move interpreters from one level of excellence to a next higher one, with each critique building on the present to move to the future. The critiquing and coaching process is a several step process.

1. What are the standards you’re critiquing against? Do you have a check list of items or procedures you are looking for? Here is an example check list that a critique might include “how well you did – did you cover all these points”? At this level we may be critiquing, but not yet coaching. The coaching comes next.

Pre-Tour
- Arrive early to walk the tour route.
- Walk trail to confirm stops for illustrating your theme.
- Check for best locations given group size.
- Check to make sure you have any of your handouts with you.
- Review your welcome and introduction.
- Meet and welcome participants as they arrive.
- Bathroom visit before tour starts?
- See if they are dressed appropriately for the walk/weather, etc.

Introductions
- Introduce yourself.
- Have visitors introduce themselves (if small enough group).
- Introduce the Theme of the walk with provokes.
- Cover safety or logistic issues (rules).
- Ask for any questions.
- Provocative statement for the first stop.

Body of the Presentation
- Use Tilden's TIPS for interpreting each stop. Be sure to link the stop to the tour theme.
- While you are walking, if one visitor asks you a question, restate the question so all can hear it – then answer it.
- At the end of one stop (reveal) – provoke for the next stop.
- Watch visitors for their comfort and interest.
- Watch your walking pace – keep everyone together.
- Wait until everyone has caught up before you start your presentation.
- Be sure each stop illustrates your theme – restate your theme, but in different ways.
- Have fun opening up eyes and minds and possibilities.

Your conclusion
- Do a quick review of the things they saw, learned about or experienced.
- Restate the theme your program illustrated.
- Do a simple evaluation of the program, asking the visitors questions about what they experiences, etc. (keep it simple).
- Inform them of other upcoming events and opportunities.
- Have any handout information or program schedules available for them (websites, volunteer opportunities, etc.).
- Offer to wait a bit if anyone has any other questions they would like to talk about.
- Bid them a safe journey home and hope to see them again soon.

It is important to note that the critique of the program or tour will only be as good as the skill, knowledge, and experience of the person doing the critique! The less experience or actual training they may have in interpretation will affect the quality of their critiques.

The skill of the interpretive coach.

The next step in the process, after the critique, is the coaching process (almost aligned with mentoring the presenter). Like on a football team, the job of a good interpretive coach is to be able to see the talent, potential and skills that a presenter may have (but not know it yet), and help to bring out the best in the presenter – help instill confidence, and see the coaching process as a positive experience.

Go to a quiet space.

When **do**ing your critique and coaching session, find a quiet, private, informal space for your review. Specific recommendation should be made to the presenter in such a way that the critiquer can check to see if the recommendations are being followed.

Interpretive program planning and presentation practicum at our US Army Corps of Engineers Interpretive Services Class- each program team presentation includes a group critique and coaching on various aspects of the program presentation and delivery. So interpretive coaching can be a key part of any seasonal or general staff interpretive training course or activity.

Nineteen steps to successful critiquing.

Adapted from Dr. Bill Lewis's training guide (1991) **"The Process of Interpretive Critiquing",** here are the key steps to consider as an interpretive critiquer or coach today.

1. **Give Positive Feedback.** But only when justified. Spread it through the critique rather than clumping it at the beginning and then doing the "needs work" parts as a clump at the end – leaving the presenter a little "bummed out". The positive feedback is to help or encourage continued growth for future programs or presentations. We don't want the presenter to feel patronized or being manipulated. The positive feedback must be genuine.

2. **Share overheard visitor comments.** As an evaluator I will often attend interpretive led programs as a "secret visitor", and just be a person on the tour, or in the audience. The presenter doesn't know I am there. This allowed me to see the "real" person and program presentation. I may talk with other audience members to ask them about some part of the program, or just hear what they are saying – or watch for their non-verbal communication. Are they looking at the interpreter, looking away, looking bored, etc? These comments will be shared with the presenter during the coaching – and might be either positive feedback, or areas that may need some attention.

3. Be provisional Instead of Certain. If the critiquer is "certain" that they are right and dogmatically insists the presenter accepts his/her point of view, the presenter may likely become defensive. A lot of energy can be wasted on "who's right". Since interpretation is an ART rather than a science, there's plenty of room for looking at the actions and words differently and uniquely. It is reasonable as a critiquer to be provisional (tentative) since it's difficult for a critiquer to know everything. This will lead to a more meaningful conversation with the presenter and the coaching can be more effective.

4. Give Praise to presenters who improve. When we've been working to accomplish something, to improve a technique or analogy for a program stop or tour, we take satisfaction from having someone recognize that work. If you have been coaching an interpretive team member for a while, and see that they have worked on doing the changes and improvements you recommended, let them know. That coaching technique will lead to continued work and improvements over time for the presenter.

5. Adapt the critique to the unique person being critiqued.

Every person, even interpreters, are unique. We all have our own special way of telling a story, answering a question, and engaging visitors. We have a unique blend of "interpreting" based on our life of experiences and training. Just as interpreters are trained to understand that there is "no general audience" – that all of our visitors are unique, a good coach would not interact with a first time interpreter – just learning the ropes – as they would with a seasoned veteran interpreter with many years of experience. An interpretive coach is a looking at each interpreter's current abilities and knowledge, but also the "potential" the person has laying in wait inside them. The interpretive coach helps release and mentor that person's true potential. Someday they may be the critiquer and coach? Are we training our coaching replacements? Maybe?

6. **Help Presenters Move to Ever-Higher Levels of Excellence**. We are all in the process of becoming something else. None of us is the same person we were 5 years ago. When I look back at programs I gave in the 1970's as a seasonal interpreter – oh my! If I could only do them over again. A good interpretive critiquer and coach can help the presenter move from one level of excellent to the next higher one. These changes may be small,

their techniques, intellectual understanding of interpretation, and their presentations consistently over time. You don't always win the super bowl the first year of coaching the team – it takes time.

7. Encourage Presenters to Use "I Didn't Know That!"s. One measure of success in a program is how frequently visitors say or think – Hum – I didn't know that! Discovery is an important part of interpretation (Tilden's REVEAL) is key here. But presenters can use that too. I was leading a hike once that had an "expert mushroom person" on the walk who "revealed" some really cool stuff about mushrooms that greatly added to the tour. I was the once saying – wow – I didn't know that! Part of coaching is reinforcing the fact that we all learn or discover new things every day. Let's enjoy those moments, especially if we can share them with our audiences.

8. Listen Carefully to Presenters and Respond to Their Comments. Sometimes we talk past each other being intent on our own voices. The best conversations are those during which the responses are derived and continued from what each person had said previously. By listening carefully to the answers from a presenter, the critiquer may obtain a clear picture of the situation and be able to make some helpful and direct suggestions. Don't just listen to the words, but also any emotion or non-verbal cues associated with the discussion.

9. Keep the Critique Short by Emphasizing Highlights. Because we can only absorb and remember only a small part of what we (about 10%), it's probably not wise to orally deposit too many words in presenter's ears. Just as good interpreters don't try to tell the visitors "everything" they know about a subject, the critiquer should be selective about what is shared with the presenter. Just as interpreters have a simple theme for each presentation, critiquers should use a theme and emphasize only a few key points. Bu emphasizing highlights, the critique can be simpler and more memorable. Additional points can be brought out in a written follow up critique.

10. Give specific suggestions instead of making general statements. For example, if the presenter is told that their theme is faulty, they are not given any indication as to how to improve it. You might say something like "you had two themes in your presentation today. It would be better to select one and develop it. The two themes I heard were ______ and ______. This can make for a more meaningful discussion as to the intent of the presenter and ways to improve the presentation.

11. Give visual attention to the presenter. We have been socialized to believe that when we talk to each other we should look at each other in the eye. But for some cultures that's not the case – some might believe that it's disrespectful, or reflects social ranking. Each critiquer must be more aware of the social norms they are working with and be more aware of other nonverbal signals being sent by the presenter.

12. Use questions effectively. Questions can help discover special needs. When we're looking at anything we're limited to our own perspective. There's so much going on around that without help from others, we're unable to perceive a great deal of it. Encouraging presenters to ask questions of the critiquers may help critiquers discover from the presenter what they're missing, and allow the critiquer to cover topics which are very important to the presenter. The questions can then involve the presenter in the critique and allows a willingness to change the direction of the critique.

13. Avoid Negative Suggestions. For example, if a critiquer asks "Were you nervous during your presentation?" the question could be seen as (1) a search for information, (2) an act of solicitude, or (3) an interpretation meaning "the critiquer must think I was nervous the about what I am going to say." The word **worry** is the negative. It might be better to say "I want you to feel good about this critique. Or "how were you feeling during your presentation?"

14. Use written forms sparingly. It's ok to use them in the overall critique to make sure you don't miss anything, but don't assume all tasks on the firm are equal. While they can help you remember the key issues you want to critique or coach on, save the forms for the written critique after the oral critique. If you sit down and go over a "list" with the presenter, they may focus on how long list is or what's on it and not pay attention to the critiquer or the messages he/she is discussing with the presenter.

15. Be persistent when you feel a presenter isn't hearing you. All life changes, even those for the better, are threatening. It's much easier to continue to do things the way you've always done them, and a new way introduced by a critiquer can be anxiety-producing. When this happens it will be necessary for the critiquer to be persistent, otherwise the perception of what was said and what was heard could be different and cause confusion for any future changes.

16. Help the presenter discover interpretive principles. That which we discover for ourselves assumes a greater importance than that which is superimposed upon us. It is important to encourage the discovery process during a critique – practicing what we preach for interpretive events. For example, you can tell the presenter "I heard you use three examples of "relate" during your talk. Can you tell me what they were?" The presenter may have used great examples of interpretive principles – just didn't know it.

17. Examine your premises frequently. The ways we look at the world are dependent upon our beliefs or premises. Each person has a unique set of premises which have been derived from his/her experiences. For example, a person can see a deer as a trophy, as Bambi, as an example of a management problem, as food, or as a host for ticks that cause Lyme disease. One perception would alter one's belief about deer management. Critiquers must realize that what they'd like to have happen during an interpretive presentation may not please others or fit the premises of visitors.

18. Include at least three things in your critique beginning.

1. **Indicate the organizational pattern of the critique**. It will make it easier for the presenter to follow you and make what you say more memorable. Chose a theme with a limited number of points. For example: "your presentation was too long. This problem can be remedied by (a). simplifying your theme, (b) eliminating superfluous materials, and (c) limiting some of your tangential material."

2. Put the presenter at ease. Some stress is inherent in critiquing of any kind, for both the presenter and critiquer. Too much stress can inhibit the learning process, it is important that critiquers put presenters at ease as soon as possible.

3. Seek variety in the way you begin. If one always starts a critique in the same way, several things could happen: (a) creativity could be stifled, (b) presenters could learn what to expect and be "prepared" for it, (c) formality could develop, (d) the uniqueness of presenters and their messages could go unrecognized.

19. Tie all the parts together in the conclusion.

A. Consider asking: "What's left over?" When the critiquer has covered all they think is important, it's usually helpful to ask the presenter if there are other matters that they like to ask about or discuss. This can be done by asking: "Are there things we haven't covered?" or "What's left over?"

B. Summarize the main points of the critique. The beginnings and endings of messages are especially important. Summaries at the end of critiques will emphasize the most important points which have been covered and help assure retention of them by the presenter.

I hope these points will be helpful for you in developing and conducting excellent interpretive program critiques and interpreter coaching. We all learn by having someone share new or improved ways of doing things, even though we may not like hearing them. As a critiquer you are helping develop the interpretive experts, coaches and mentors of the future.

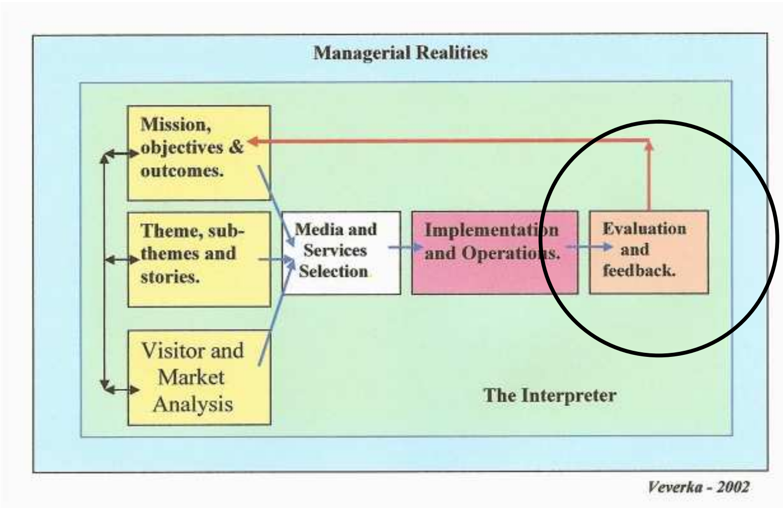
A special thanks to Dr. Bill Lewis, who created these critiquing points that I have expanded on a bit. I spent several years co-teaching an interpretation course with Bill, and he became my mentor and coach and passed on his coaching torch and secrets to me, as I have now just done to you, and as you will assuredly do for others.

Chapter 10 - Evaluation of interpretive programs and services.

Measure twice, cut once... Carpenters proverb.

As part of every interpretive plan, from large scale interpretive master plans to a plan for a single interpretive exhibit, we always build in the recommendations for conducting some form of evaluation to pre-test any interpretive media, services or program.

The model of interpretation discussed in the first chapter talks briefly about the role of evaluation. In the new Interpretive Master Planning text book, Volume One, there is a more in-in-depth discussion of evaluation, especially for live interpretive programs.



In this book I wanted to look more at evaluation for exhibits, and included some recent interpretive evaluation work. This chapter also includes the extensive "self evaluation" document I developed for the US Army Corps of Engineers to use as a tool to evaluate their visitor centers, from the parking lot into and through their facilities. Also for critiquing/evaluating individual existing interpretive exhibits.

Let's start out with some quick review of evaluation techniques.

The six main parts of the evaluation process include:

- Identify the objectives that you want to evaluate.
- Select the most appropriate evaluation technique or tool.
- Apply the technique and obtain results.
- Compare actual results to the results desired from the objectives you are evaluating against.
- Make recommendations for improvement, if necessary, to improve the effectiveness of the media or program whose outcomes are being evaluated.

Direct Audience Feedback. Using this technique the interpreter/evaluator interviews visitors responses to the program, exhibit or media being tested. This allows for immediate analysis of what the visitors actually think/feel. The interpretive planner can then make immediate changes to the interpretive media, such as interpretive panel drafts, to evaluate to see if the changes improve the results the media or services was to accomplish.

Auditing by an Expert. In this option you have an expert in interpretation, evaluation, psychology of the audience, recreational learning, etc. either develop an interpretive evaluation tool/questionnaire, or do observations and personal assessment of the interpretive media. This might include reviewing interpretive writing and texts, interpretive design, and related issues associated with the interpretive plan for reviewing existing interpretive programs, services, facilities or media.

Direct measures of behavior. This evaluation tool usually involves physical measure of behavior such as attendance figures, purchases of items in gift shops, hits to a web site page, etc. The main issue here is you don't know the reason(s) behind the selections or behaviors. Sometimes this method is used to see what kinds or types of services visitors prefer (hikes, trails, evening programs, preferences in exhibit types and so on.

Observations of audience attention.

This is a fairly straight forward evaluation tool we often use in pretesting new interpretive exhibits or panels, as well as evaluation existing media. It involved finding out the length of "read viewing/reading time" compared to the amount of time visitors engage with the panel or exhibit in this example.

If it takes 3 minutes on average for a person to "read everything" associated with an in interpretive panel or interpretive exhibit, and the person is only engaged with the panel example for less than one minute, then something happened that discouraged the visitor from reading or interacting with the media to its completion. What we don't know from this observation method is the important "why" question. At this point we would have the option of doing more in-depth evaluations such as interviewing the visitors to find out why they disengaged with the media.

Questionnaires and visitor surveys

This is where a written set of questions are given to visitors to determine both demographic data and their responses to specific questions. Questions regarding specific interpretive services are typically incorporated into the questionnaire. But great care must be taken to ensure that as much bias is removed from the survey process, both in how the surveys are delivered, but in how the questionnaires are written. Later on in this chapter I will provide some examples of survey research questionnaires.

Pre and post test surveys and questionnaires.

As part of the interpretive planning process as noted in the Model of Interpretation, we always recommend that any new interpretive media (interpretive panels, exhibits, trail or gallery guides, audio tours, etc.) always be pre-tested. Essentially, we want to know how much visitors already know about the subject/topic of the media in the pre-test, then have visitors interact with the new media, and then do a post test evaluation to see if there was an increase in knowledge, attitudes or perceptions. In other words, were the interpretive objectives detailed in the interpretive plan actually accomplished at a acceptable level.

Kirby Science Center Exhibit Evaluation - pre/post testing and formative evaluation case study summary.

For the interpretive exhibits planning for the Kirby Science Center the first step was to develop the Interpretive Exhibit Plan for the total science center. These included the main interpretive theme and then individual interpretive planning work sheets for each exhibit. These worksheets as part of the interpretive plan included the specific objectives each exhibit was to accomplish. Thus the exhibit design and text were "outcome based" - to accomplish via design and text the objectives each exhibit was to accomplish.

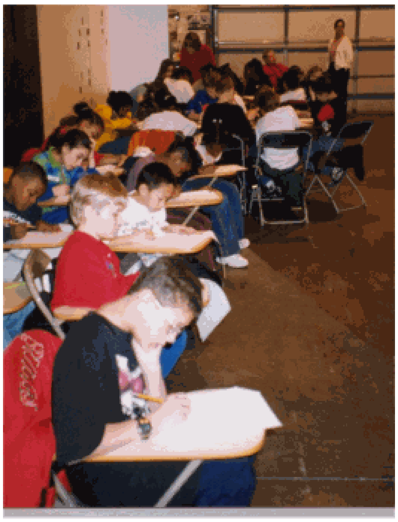
What were the exhibits supposed to do?

Before you can evaluate anything you have to first know what it was supposed to accomplish. Part of the total exhibit plan was an "Interpretive Exhibit" plan. This consisted of each individual exhibit having – in writing – a specific concept the exhibit was to present, and specific learning, behavioral and emotional objectives each exhibit was held accountable to accomplish. We would later evaluate the mock up exhibits against those stated objectives.

The evaluation strategy.

For this evaluation strategy I developed several different evaluation methods to be used for the total evaluation. The evaluation would take approximately 4 weeks to do. We set up draft/mock-up exhibits in the warehouse of Derse Exhibits – evaluating approximately 15 exhibits each week, representing six different science subject areas. We then arranged with local schools for teachers to bring in their classes to "test the exhibits" for us. We would test each set of 15 exhibits over the course of one week. The evaluation strategies included:

A written pre test and post test. We brought in school busses of children from different schools to be our "audience" for the evaluation. Before being allowed to use the exhibits each group took a short written multiple choice and true/false pre test relating to each exhibits objectives. After the pre test the children could then go and "use" the exhibits. After spending about 45 minutes with the exhibits they came back for a written post test. We wanted to see if there was any change in what they knew about the tested science concepts from before seeing and using the exhibits – and then after they interacted with the exhibits.



Observational Studies. This part of the evaluation used a trained observer stationed at each exhibit to simply watch/record what the children did or didn't do. This told us a lot about things like "instructions", graphic placements, and subjects that children did and didn't have any interest in.

The quick fix – and fix – and fix again.

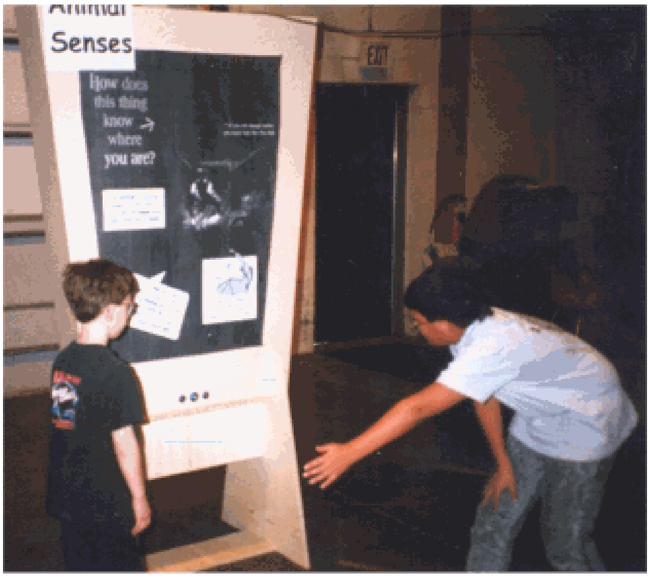
Essentially our plan was to have two groups of children test the exhibits on Monday of each of the four weeks. We would then analyze the test results and our observational results – make any changes to the exhibits on Tuesday – bring in two new groups of students on Wednesday – make any more corrections on Thursday – do one final test on Friday – make any final adjustments, and then ship out the completed exhibits from that weeks testing on to the Science Center over the weekend. We would then repeat the evaluation process the next week for 15 different exhibits.

What we found out – Oh the pain!

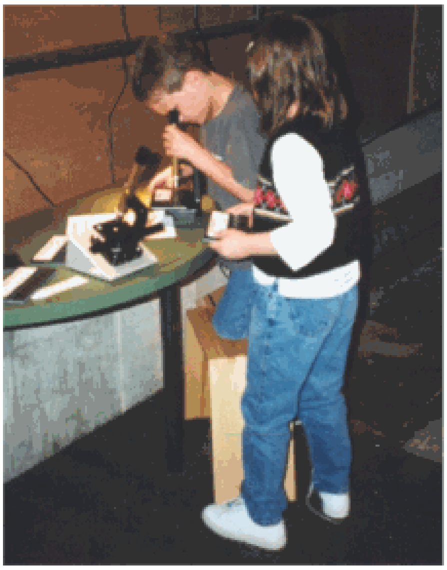
What did we learn from this experience? We learned that if we had not done the testing the great majority of the exhibits we "adults" planned would have been failures! Virtually EVERY exhibit we tested had to be "fixed" in some way. Here are a few examples of some of the things we observed:

For example, with this exhibit on "magnetism"(above) you were directed (left photo -arrow) to move the magnet on the chain **UNDER** the objects, the magnetic items would then move. Not one child followed these directions. They only used the magnet from **above**! They wanted to see the magnet on the chain interact directly with the item in the exhibit (right photo). We fixed this by changing the directions and raising items in each container so magnetic objects would react with the magnet held from above. We found that children found any written directions to be "invisible". In 98% of the cases the children did not look at or read "any" directions unless an adult suggested they do so. If they had to read complex directions to do the activity – they usually left the activity.

Another interesting example of what and how children think was our "how bats find food" exhibit (below).



We also were able to test the construction of the exhibits themselves, and some of the exhibit tools. For example, our "indestructible" microscopes (photo below) didn’t last a week!



What we learned.

This month long evaluation process taught us all a lot, the most important of which was that if we hadn't done the evaluation we would have built exhibits using adult ideas of how children learn that children would NOT have learned from.

Some key points:

From the pre-post tests, we found that there were some subjects students already had good concept level understanding of – pre tested at a 80% correct response or higher on the written test; and some areas they had a very poor understanding of – with correct responses on the pre test of 50% or less. We did find that when comparing the pre test and post test results, there were often increases in correct answers on the post tests, depending of the individual exhibits. So the exhibits were generally working – but the initial post test improvements were generally very weak, may be only 5-15% improvements on post tests at the start of the week (Monday testing). But by Friday, after the exhibits had gone through many changes in design, instructions presentation, and concept presentation, we were at an average of 80% comprehension or better on post testing for most exhibits. By doing this **formative evaluation** throughout the week of testing, we were ending up with "very good to excellent" exhibits as far as having their educational objectives accomplished at a 70% level or higher (our goal).

We found that EVERY exhibit we evaluated over the 4 week period (about 60 exhibits) had to have some "improvements". Some exhibits just needed a little fix – such as the addition of a label that said "push the button" (otherwise the button to start the activity would not be pushed), to some exhibits needing a major re-design.

We found that children did not even look at, let alone read any "written" instructions. But we did have success in redesigning instructions in cartoon or "comic book" formats – more visual presentation instructions. The instructions themselves **had to look fun or interesting.** For many of these exhibits to be used most efficiently would require a docent, science educator or teacher to help facilitate and direct the learning activity. But the exhibits did work effectively on their own after evaluation driven re-designs. When our researchers facilitated the learning – explaining directions, etc. the exhibits worked wonderfully.

The design team and the client all learned that the ONLY way you will know for sure if you have a "successful" exhibit – not just a pretty exhibit – is to evaluate it with your intended target market group. The visitors will tell you if your exhibit is successful in communicating with them or not – if you ask them!

US Army Corps of Engineers Visitor Center Exhibition Evaluation Strategy - Sample Self/Team Evaluation Survey Instrument case study.

For this evaluation tool document we had to include some "instruction" on what interpretive exhibits actually were as the evaluator using this tool may have had no training at all in interpretive services or interpretive exhibit planning. The following document is presented exactly as developed for use by the US Army Corps of Engineers interpretive staff/planners.

Purpose of this survey tool.

Quite often visitors to Corps of Engineer (COE) projects (parks) and visitor centers do not come in direct contact with COE staff. It becomes the role of self-guiding interpretive services and media, such as COE visitor centers, to help visitors understand:

1. The Corps Mission
2. How the Corps project site benefits the region, community, people, and the environment.
3. Any special stories, projects or programs currently in place at any particular Corps project, such as archaeology programs, wildlife or fisheries management programs, etc.
4. How to safely and responsibly use the Corps resources (water safety, etc.).

<u>It is the role of this evaluation package to serve as a tool to assist project managers or staff in assessing the effectiveness of visitor center exhibits in effectively communicating with visitors about the Projects mission, stories and benefits so that, if needed, exhibits can be modified or replaced over time to more effectively connect with visitors.</u>

Interpretive vs informational exhibits

In general we know from various research studies that interpretive exhibits are more effective in communicating with visitors that informational exhibits. So what makes an exhibit “interpretive” and what is “interpretation”?

The Corps of Engineers defines interpretation as a “*Communication and education process provided to internal and external audiences, which support the accomplishment of Corps missions, tell the Corps story, and reveal the meanings of, and relationships between natural, cultural, and created environments and their features”*.

Interpretive exhibits are planned in a whole different way than informational exhibits in that interpretive exhibits must ***translate*** the exhibit information from the **language of the expert** into the **language of the visitor.** So interpretive exhibits translate “concepts”. Interpretive exhibits are also planned to be “outcome based” or product based. That means that every exhibit should be designed to accomplish specific objectives (learning objectives, emotional objectives and behavioral objectives). The true test of an exhibit being “good” is then based on how well the exhibit accomplishes these stated objectives.

Theme based Visitor Center Exhibits

In evaluating visitor centers and their exhibits, another key area for review is the clarity in which the interpretive THEME of the project or visitor center is presented. An interpretive theme is *the one main idea or concept that you feel it is important for the visitors to remember, feel or do as a result of the visitor center exhibit experience.* Ideally COE visitor centers should have one clearly stated theme which all of the exhibits in the visitor center help illustrate. For example:

The XYZ Project manages water and wildlife resources to benefit the region and people in three key ways.

This is an example of an interpretive theme for a visitor center exhibit room. Based on this theme, exhibits would be planned to “illustrate” just **how** the XYZ project manages water and wildlife resources to benefit the region and people – what are the three ways?

Interpretive themes for COE visitors centers are critical in helping make sure visitors receive a clear understanding of the role of COE Project sites.

Outcome based Exhibits

COE visitor center exhibits should be planned and designed to produce a “product” or outcome. For example, if a Project spends $10,000.00 on exhibits for the VC, the question is “what are you getting in return for your $10,000.00 investment”? With this visitor center exhibit planning approach, COE visitor centers can utilize more cost efficient and cost effective exhibits. Every COE visitor center exhibit should then be objective based, as mentioned earlier. For COE visitor center exhibits three types of objectives are recommended:

Learning Objectives: (Example) As a result of interacting with the exhibits the majority of visitors will be able to list three ways this project benefits people and the environment.

Emotional Objectives: (Example) After viewing the exhibits in the visitor center, the majority of local residents will have an increased sense of community pride in having a COE Project so close by them.

Behavioral Objectives: (Example) As a result of interacting with the visitor center exhibits all visitors who boat will wear their PFD's.

What makes an exhibit "interpretive"?

Another important area for evaluation is the "interpretiveness" of exhibits. In general the basic principles of interpretation are that the message or exhibit presentation should:

Provoke the attention, interest or curiosity in the visitor to "want to know". This is done in exhibits with provocative exhibit headers such as "This Plant Could Save Your Life" or by using large or provocative graphics or photos.

Relate to the everyday live of the visitor. We need to give visitors a visual understanding of terms and concepts using analogies, metaphors and similes. An example might be: *If a section of the water channel were diverted through your living room, it would only stretch from the floor to the ceiling. That's enough depth for these gigantic ships to pass through this waterway.*

Reveal the main concept or point through some creative or unusual viewpoint or style. Give the answer last! For example *Did you know that this dam churns out nearly 1.2 million kilowatts per year – enough electricity to light _____ cities for _____ months!*

So one important component in evaluation of COE visitor center exhibits is looking at just how well these interpretive principals are used.

Visitor Center Exhibit Load

The concept of exhibit load is a simple one. Every time a visitor views or interacts with an exhibit they use up energy and enthusiasm. The more exhibits visitors see and interact with the more emotionally drained they get. Some exhibits have a high load – that means they require the visitors to think and concentrate more – using up more energy. Other exhibits are low load requiring less effort from the visitors to interact with them. There are four basic kinds of exhibits, each having a different load factor. We can use this to analyze existing exhibits (or plan for new ones) to help explain such things as:

- Visitor flow patterns in visitor centers – visitor are attracted to high load exhibits.
- Staying power visitors may have at particular exhibits (average viewing time is 15 seconds).
- Why some exhibits are simple passed by and not looked at.
- Why some visitor centers may be considered “boring” by visitors.

Exhibit Load Matrix

Visitor

Exhibit

Active	**Type 1**	**Type 2A**
Passive	**Type 2B**	**Type 3**

High Intrinsic Interest

Type 1

type 3

Low Intrinsic Interest

Type 1 exhibits are where the exhibits does something and the visitor does something, an interactive exhibit such as a computer exhibit.

Type 1 exhibit have more attraction power and holding power. They also have a higher load – requiring the user to think and concentrate more than the other types of exhibits.

Type 2 exhibits. These are exhibits where the visitor does something put the exhibit is inert, or where the exhibit does something but the visitor doesn’t.

This geology exhibit is a type 2b – the exhibit is passive and the visitors is active. This is also true with a typical "touch table" exhibit.

Aquariums are good examples of type 2a exhibits (the exhibit is active but the visitor just watches). Other examples of 2a exhibits are video programs, watching model locks work, watching a boat go through a lock.

Type 3 exhibits. These are exhibits where the exhibit does nothing and the visitor does nothing. Flat work graphics or materials in cases. These exhibits usually have the lowest interest for visitors.

This type 3 exhibit helps make up for its lack of interactive opportunities by using good exhibit design and good interpretive techniques.

What does exhibit load analysis tell us?

By looking at the exhibit load for the total visitor center and for individual exhibits, we might be able to overcome "boring" exhibits by doing some exhibit rehab work to make the type three exhibits more interactive. In general you should have a mix of exhibit types:

Approximately 20% type 1 exhibits.

Approximately 60% type 2 exhibits.

Approximately 20% type 3 exhibits.

This balance of exhibit load allows for visitors to have fun with "challenging" exhibits, and use the type 3 exhibits as mental resting points.

In general, visitors remember:

10% of what they hear;
30% of what they read;
50% of what the see;
90% of what they do.

Based on this, it is important for COE visitor center exhibit to provide a mix of all of these components, with the visual and hands-on components of exhibit design being key to exhibit concept retention by visitors.

Design considerations for interpretive exhibits – some general rules.

- Label copy should use bold, provocative headers to draw the visitor's attention. Copy should be about 50 words long, with not more than 100 words per exhibit segment. (two 50 word paragraphs).
- Label copy text should be no less than 30-point size. See exhibit example 3a above for an example of this.
- Most visitors only spend about 15 seconds per exhibit. If you can't get the main point across in 15 seconds, you probably won't get it across at all.
- Any photograph should have a caption with it, otherwise visitors will probably make-up their own and it will be incorrect.
- Ask yourself- "why would a visitor want to know this information"? If you can't come up with answers you will probably have a "walk-by" exhibit.
- Ask yourself – "how do you want the visitors to USE the information the exhibit is providing"? If the visitors can't use the information then why are you giving it to them?

Having successful interpretive exhibits in COE Visitor Centers

To have truly successful visitor center exhibits requires a combination of factors. The exhibits in a visitor center must work together to illustrate a common theme and objectives for the TOTAL visitor center experience. The exhibits should follow good design considerations for visual graphics and length of text. Exhibits need to be designed based on Tilden's Interpretive Principles. And the exhibits in the visitor center need to be paced considering the exhibit load concept of exhibit attraction power. All of these factors, when mixed together properly, can produce outstanding and cost effective interpretive exhibits for any COE visitor center.

It is the goal of this document and evaluation strategy to help you learn just how effective your exhibits are in helping you accomplish your Project's mission and in communicating your unique story to your visitors. Likewise, this can also serve as a tool in helping to learn which of your current visitor center exhibits are "just fine", which need a little re-hab work, and which exhibits need to be replaced.

For more information on interpretive exhibit **planning,** here are some references that you may already have in your Project library:

US Army Corps *Interpretive Services* Course manual.

Interpretive Master Planning by John Veverka

Environmental Interpretation by Dr. Sam Ham

Interpretation of Cultural and Natural Resources by Douglas Knudison, Ted Cable and Larry Beck.

Visitor/Interpretive Center
Assumptive Evaluation Form

Introduction

In conducting *scientifically valid* evaluations for visitor centers or interpretive centers for any agency or organization, the evaluation team must first have an understanding of the specific objectives, outcomes, or managerial realities of that facility (available budget, time constraints, etc.). In addition it would be required to know the target market groups the center was designed for as well (local repeat visitors, one-time tourists, school groups, bus tour groups, etc.) to see if the facility design, services and exhibits are indeed effective in serving and communicating with those target market groups. If this information is not available then a formal evaluation against stated outcomes cannot be done. The next option is called an "**assumptive evaluation**" or *auditing by an expert*.

The Assumptive Evaluation is conducted against evaluation criteria where the expert or team of experts, not knowing what the original planning and design objectives were, ***assume*** what the intent of the design was, and do an evaluation against these assumptions. In addition, the team would critique the facility and exhibits against a general criteria of professionally accepted standards, such as for interpretive exhibit design or handicapped accessibility.

While not scientifically valid, the assumptive evaluation does have benefits for the agency managing the visitor or interpretive center being critiqued. Ideally, the conclusions that the team "assumes" were the main interpretive theme, messages or concepts are indeed very close or "right on" to what the visitor or interpretive center "intended" the main "take-away" messages to be. That would illustrate that the Center is indeed communicating its mission and story effectively to visitors. However, if the main interpretive theme, concepts or messages the evaluation team assumes were the main focus or outcome were NOT what the visitor or interpretive centers main exportable theme or concepts were – then the center is NOT effectively communicating its mission and stories to visitors. If that is the case, then a more formal scientifically valid evaluation would be needed to isolate the problems and recommend changes to make the center more effective in communicating with visitors for that particular facility.

Visitor Center   Assessment Form

Introduction: This Visitor Center Assessment form is used for conducting *Assumptive Evaluations* – where evaluating against stated objectives or outcomes is not possible. It is designed to critique the Visitor Center against a list of generally accepted professional planning, design, and interpretive communication criteria and standards. The completed evaluation can serve as a tool to both support or validate visitor center and exhibit success or strong points, or note areas in visitor center and exhibit design that could use improvement. Note that the results are *subjective* and based on the background and professional training of the evaluator or evaluation team.

Instructions: Each evaluator should answer each question in the survey based on their personal understanding of professional standards for the subject, site or facility being critiqued. Space is provided (or use the back of this form) for additional written comments you might have about a particular question.

Facility Name: ____

Location: ____

Agency (COE, USDAFS, etc): __________________________________

Pre visit and facility exterior assessment:

1. Was the highway signage providing directions to this site:
   a. Poor   b. Adequate   c. Very Good

2. What improvements to the visitor directional signage would you recommend?

3. What were your first impressions upon arriving at the facility?

a. looks well designed, landscaped and inviting.
b. Looks like an average visitor center.
c. Looks like an average government building.
d. Looks like an office – hard to tell there was a visitor center in there.
e. Other ________________________________

4. On a scale of 1 to 5, how would you rate your first impression of this facility before going into it?

Poor First Impression Good or Average Looks Great/Inviting

1 ------------2-------------3-------------4-------------5

5. How would you rate the facility grounds and landscaping:

1. Poor – looks in kept.
2. Average – grass is cut, looks OK
3. Very Good – good or appropriate landscaping, well maintained.
4. Other: _________________________

6. How would you rate the building appearance:

1. In poor shape in need of obvious repair.
2. In average shape, some repair work needed (painting, etc.).
3. In good shape, looks well maintained.
4. Other: _______________________________

7. Agency identification – is it clear as to which agency manages this facility via logos or other outside identification:

Yes_____ No_______ Other___________

8. Is there an outdoor orientation board, panel or kiosk that visitor can use prior to entering the facility that tells them about the site, facility, resource locations, or other orientation information:

   Yes________ No_________

9. Are there any outdoor interpretive panels or experiences that visitors might encounter before they enter the visitor center:

   Yes_______ No _________

   If yes, do these interpretive materials help introduce the main theme or mission of this particular facility?
   ____

   ____

10. Is there an obvious handicap accessibility route from the parking area into the visitor center? Yes_____ No ______.

11. In general, given all of the above considerations, how would you rate the your total exterior impression of this facility:

    Generally Poor, Needs Work About Average Very Good to Excellent.

    1 ----------------2-----------------3--------------------4---------------------5

You may add additional comments to the back of this page.

Visitor Center Internal Assessment:

1. Upon first entering this facility, what were your general first impressions (did you like it, not like it, didn't know where to go, etc.)____________________________
   ____

2. What do you think that the visitor's **first impressions** or feelings about this facility might be? ____

____

3. Was there a receptionist or “greeter” when you entered? Yes_____ No_____
   If yes, how was your welcome? ____________________________________
   ____

4. When you entered, was it clear as to where restrooms, exhibit rooms, etc. were located? Yes____ No_____

5. What is the mix of interpretive programs or services available (circle all that apply)
   a. Exhibit room
   b. Outdoor viewing area
   c. Theater production/AV show
   d. Live interpretive programs
   e. Other______________________

6. Was it clear at the beginning what the main objectives or mission of this center was?

   Yes_____ No _______

The exhibit room

7. When you first entered the exhibit room, was there an orientation exhibit that told you the main interpretive theme or purpose for this exhibit area and visitor center?
   Yes___ No____

8. What do you think the main interpretive theme or message for this visitor center is?
   ____
   ____

9. How would you rate your *first impression* of the exhibit room:

   1. Visually poor, didn’t look very inviting or stimulating.
   2. Exhibits looked OK, not a lot of sparkle or draw.
   3. Looks like typical exhibit room – average
   4. Looks above average – inviting, vis ll done.
   5. Excellent – looks like fun, visually draws me in.
   6. Other: ___________________________________

10. Does the exhibit room appear to be handicap accessible (room for wheelchairs between exhibit elements, etc. Yes_____ Somewhat____ No

11. Are the exhibits visually accessible to visitors in a wheelchair (proper sight lines or access to interactive exhibit elements? Yes____ Somewhat_____ No ______

12. Are there hands on or tactile exhibits appropriate for visually impaired or blind visitors?
    Yes____ Somewhat____ No___

13. Are there any exhibit materials, exhibit label copy, or other educational materials that relate to the exhibits that are available in braille? Yes____ No ______

14. What is the age of the current exhibits (installed in….) ______.

15. What is the current condition of the exhibits in general:

    a. In poor shape, old, and in need of replacement.
    b. In fair shape, will need some rehab work to update some of the exhibits ASAP.
    c. In good condition, need some update work in next year or two?
    d. In excellent condition.

Answer the following questions *after* you have had a chance to look at the exhibits.

16. In general, did you feel that the exhibits successfully communicated to visitors the main interpretive theme of the visitor center? Yes___ Somewhat____ No______

17. In general, did you feel that the majority of the exhibits effectively illustrated the main mission, story or theme of this visitor center? Yes__ Somewhat____ No____ (feel free to comment on the back of this page).

18. In general, did you feel that the text or content level presentation of the exhibits were:

    a. Written to simply or needed more information
    b. Written at the correct content level (5th grade vocabulary).
    c. Written at to technical off a content level
    d. Other: ____

19. In general, did you feel that the point size of the main label text copy:

    a. Was two small and hard to read.
    b. Was OK or about average
    c. Met professional museum standards of about 30 point size or larger.

20. In general, how would you rate the Attraction Power of the exhibits (their ability to draw you to them and hold your attention).

    a. Poor – most did not look interesting.
    b. About average – about ½ looked interesting.
    c. Excellent – most exhibits looked inviting

21. Of all of the exhibits you looked at in this center, how many exhibits out of the total did you look at and read **all the exhibit label copy**?

    a. Only a few of the exhibits.
    b. About ½ of the exhibits.
    c. Most of the exhibits.

22. In general, what do you think the **average time** you spent interacting with (reading the label copy, doing interactive activities) the exhibits in this exhibit room or gallery?

    a. Under 15 seconds per exhibit.
    b. Between 15 seconds and 1 minute per exhibit.
    c. Over 1 minute per exhibit.

23. In general did the exhibits look well maintained: Yes____ Somewhat____ No___

21. Were any interactive exhibits "out of order"? Yes____ No____
    If yes, about how many? ________

Media mix and exhibit load.

Exhibits are rated by their "load factors", that being the amount of energy (cognitive, physical or both) that the exhibits requires a visitor to expend in order to interact with the exhibit. There are basically three kinds of exhibits:

Type 1 – Interactive exhibits: visitor is active, exhibit is active.
Type 2 – Exhibit where either the visitor is active (touch table) or the exhibit is active (watching a video).
Type 3 – Visitor does nothing, exhibit does nothing (graphic flatwork, display cases).

The type 1 exhibit has the highest load, the type 3 the lowest load. Visitors have the highest intrinsic interest in Type 1 exhibits and the lowest interest in Type 3 exhibits. In general we like visitor center exhibits to have a exhibit load mix of:

Type 1 exhibits 20%
Type 2 exhibits 60%
Type 3 exhibits 20%

22. Based on the above ideal load mix, what do you think in the exhibit load mix for this visitor center exhibit room? Type1 ______ Type 2 _______ Type 3 _______

Interpretive exhibits are different from purely “informational” exhibits in that interpretive exhibits must translate information into terms and analogies that every day people can relate to and understand. The following critique questions will focus on the perceived interpretive level of exhibit design and presentation.

23. In general, how well do you think that the exhibits used the interpretive design concept of “provocation” to get your attention?
    a. Not at all
    b. Somewhat
    c. Very well

24. In general, how well do you think that the exhibits “related” to the every day lives of visitors (via analogies, metaphors, or other ways for the visitor to better understand technical concepts)?
    a. Not at all
    b. Somewhat
    c. Very well

25. In general, how well do you think that the exhibits “revealed” their stories and key concepts to visitors (using surprise endings or other design/text strategies to have the visitors “guess” what the answer might be before revealing the answer to them)?
    a. Not at all
    b. Somewhat
    c. Very well

26. In general, and based on Tilden’s Interpretive Principles, how would you rate the exhibits for their interpretive communication use:

    a. Very poor – mostly information, not interpretation.
    b. Somewhat interpretive – use of interpretive principles in about ½ of the exhibits.
    c. Very Interpretive – use of all interpretive principles in most exhibits.

27. An important part of the total exhibit experience is what you remember most by the time the exhibit room visit is over. What do you think were the three most important concepts or ideas that you personally gained from this visitor center exhibit experience:

    1. ____
    2. ____
    3. ____

28. Do you think that these were the three main concepts that the visitor center managers/agency wanted you to leave the visitor center knowing or feeling?
    Yes___ No_____ Not sure_____

29. On a scale of 1 to 5, with 5 being the highest rating you can give a visitor center or interpretive center in being able to **effectively present and interpret its mission and story to visitors so that visitors will REMEMBER** the main theme or messages after leaving the center, how well do you think this center did:

    Poor Success   Average Success   Above Average   Far above average

    1--------------2------------------3----------------4--------------5

General Evaluation Discussion

1. What recommendations for visitor center improvements (exterior and interior) can you suggest (if needed).

2. What barriers or issues could possibly hinder putting the recommended improvements in place? (in consultation with site staff)

3. What would you consider to be the key or priority recommendations that should be done first (if any)? (in consultation with site staff).

4. In general (from center staff), what is your annual exhibit maintenance and upkeep budget. Do you think that it is satisfactory?

5. In general, which exhibits cause you the most problems (maintenance, etc.) and why?

Individual Interpretive Exhibit
Design Critique

Instructions:

This evaluation form should be copied, with one form set being completed for **each individual exhibit** in your exhibit room.

Exhibit Name or Subject: ____

1. Does this exhibit have content and design objectives in writing? YES NO

   If yes, use a copy of the original objectives as part of the exhibit critique.

1. This exhibit is a: Type 1____ Type 2a_____ Type 2b_____ Type 3_____.

2. From the exhibit design, are the *intended* objectives of this exhibit clear?

   Learning Objective:

   Behavioral Objective:

   Emotional Objective:

4. Does the exhibit have a clear theme? YES NO

   If yes, what is it? ____

4. Does the exhibit subject or presentation provide an example that clearly illustrates one of the total visitor centers sub-themes or illustrate the main interpretive theme? YES NO

6. Does the exhibit get its main point across in 15 seconds or less? YES NO

7. Does the exhibit use interpretive techniques in its design and copy?

   What is the PROVOKE for this exhibit? ____________________________

   What is the RELATE used here? ____________________________________

   What is the REVEAL? ____

Individual Interpretive Exhibit
Design Critique

8. On a scale of 1 to 5, how would you rate the use of Provocation in this exhibit:

   No use of Provocation   Some what provocative   Very provocative

   1-------------2------------3--------------4-------------5

9. On a scale of 1 to 5, how would you rate the use of “Relating to the everyday live of the visitor” in this exhibit?

   No use of *Relate* technique   Some use of *Relate*   Very good use of *Relate*

   1----------------2--------------3---------------4-------------5

10. On a scale of 1 to 5, how would you rate the use of the concept of “Reveal” in this exhibit?

    No Revelation   Some Revelation   Very good use of Revelation

    1-----------2---------3----------4-------------5

11. What is the required viewing/reading time for this exhibit? ________ minutes

12. What is the actual viewing time for this exhibit? _________ minutes.

13. When you look at this exhibit subject, topic or content, answer the question: *Why would a visitor want to know this?* If you find it difficult to answer this question it may explain why visitors might ignore this exhibit.

____

____

14. When looking at this exhibit, answer the question: *How do you want the visitor to USE the information this exhibit is giving them?* If visitors can’t use the information, then why are you giving it to them?

____

____

Individual Interpretive Exhibit
Design Critique

15. How would you rate the label copy for this exhibit?

Boring Somewhat well written Very well written

1--------2----------3-------------4-------------5

16. How would you rate the selection of graphics or photos for this exhibit?

Visually boring Somewhat visually interesting Very visually interesting

1---------------2----------------3-----------------4------------------5

17. How would you rate the amount of label copy for this exhibit?

To much to read Some what OK Just right

1----------------2-----------3--------------4------------5

18. How would you rate the kinds of artifacts used in this exhibit or display?

Not interesting Some what interesting Very interesting

1------------2--------------3----------------4--------------5

Individual Interpretive Exhibit
Design Critique

19. Given your responses to the previous questions, do you feel that this exhibit is:

1. Just fine, works to illustrate our theme and accomplishes its objectives. Keep it.
2. Is somewhat OK, but needs some re-hab design to make it more effective.
3. Does not contribute to accomplishing any of the Projects missions or visitor center objectives and should be replaced with more effective and focused interpretive exhibits.

If your answer was #2, *needs some re-hab work to make it more effective*, what are some ideas you have as to how that may happen. Any ideas or suggestions?