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Advanced Interpretive Planning

*Essential concepts and strategies for
today's interpretive planners.*

John A. Veverka



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 though 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:

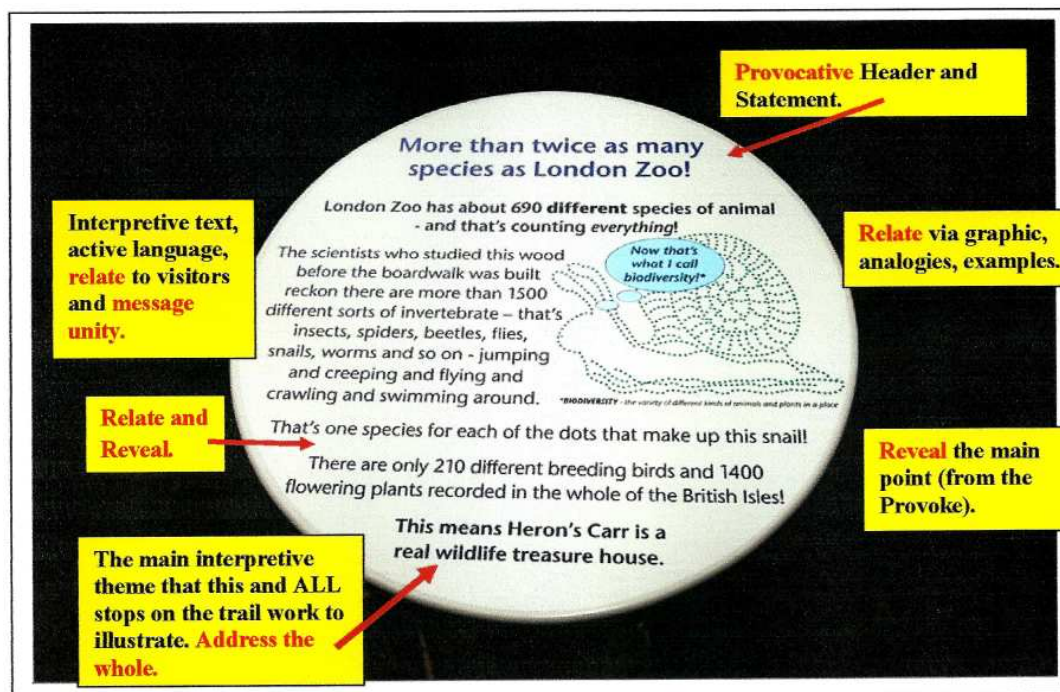
- a. Interpretive panels, exhibits, etc. should have a “provocative” header or Graphic (or both) to attract attention – a question or statement, whose answer will be “revealed” or illustrated by the end of the panel text, exhibit or other media presentation.
- b. Interpretive panels, in this case, should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

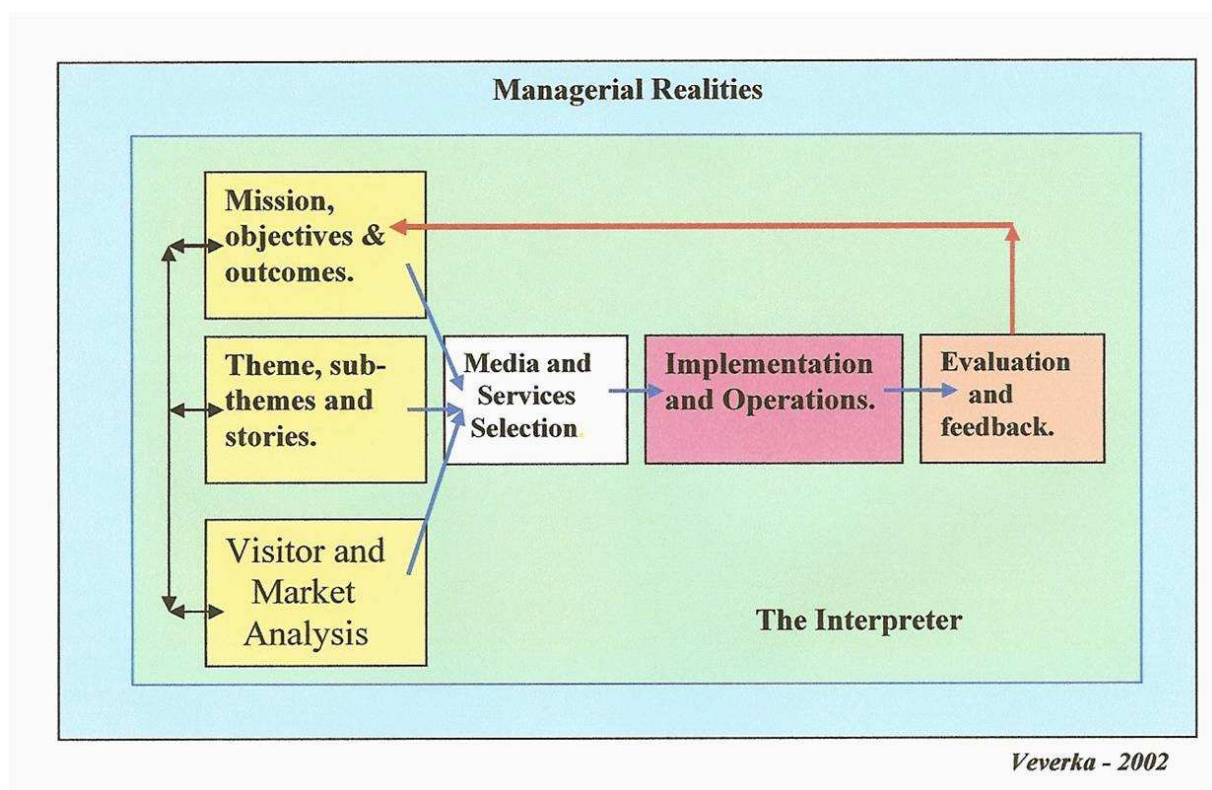
Interpretive Graphic Standards

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 rationale.
 - B. Main Sub-themes and rationale.
 - 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.

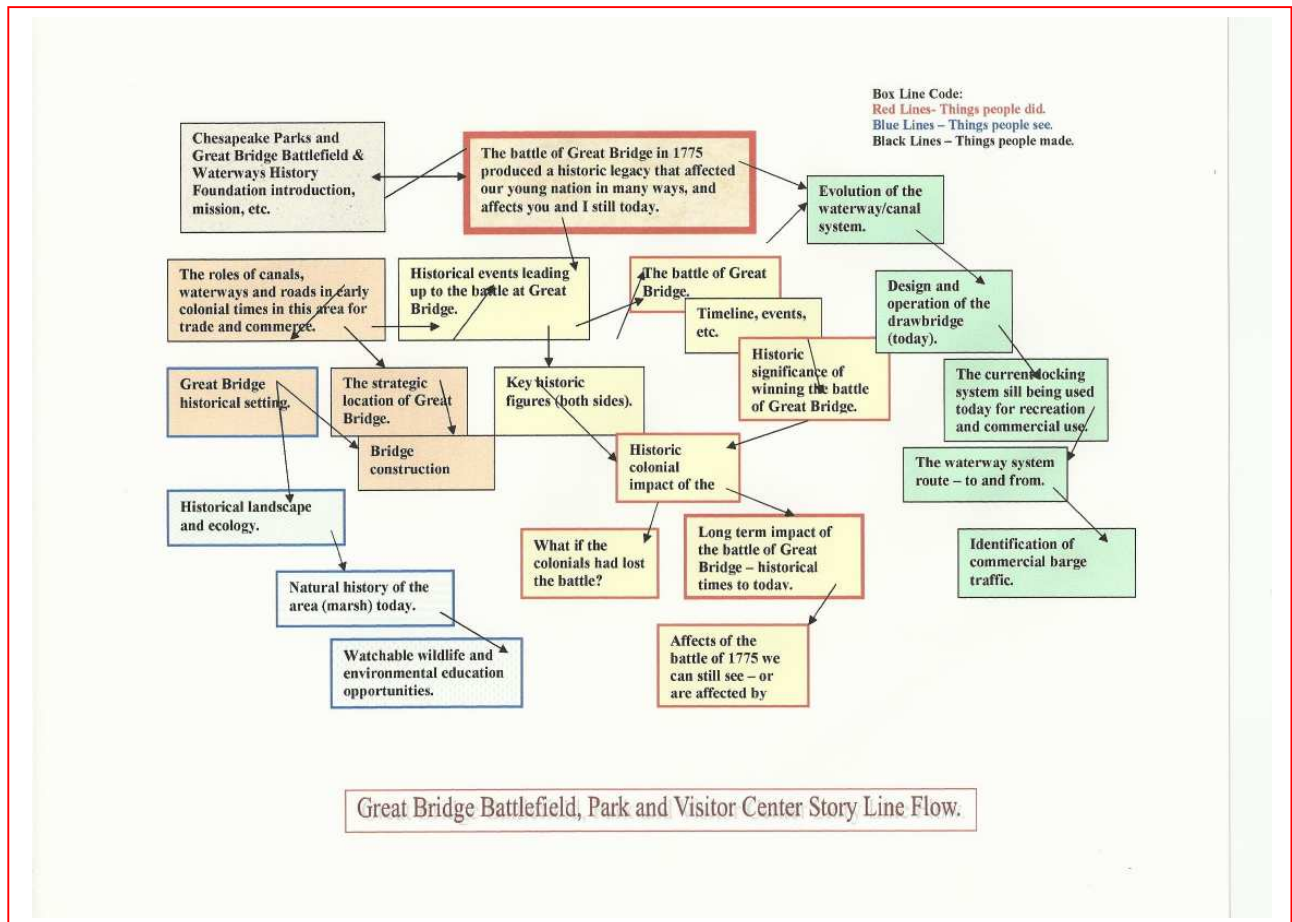
An interpretive theme:

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 and 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).

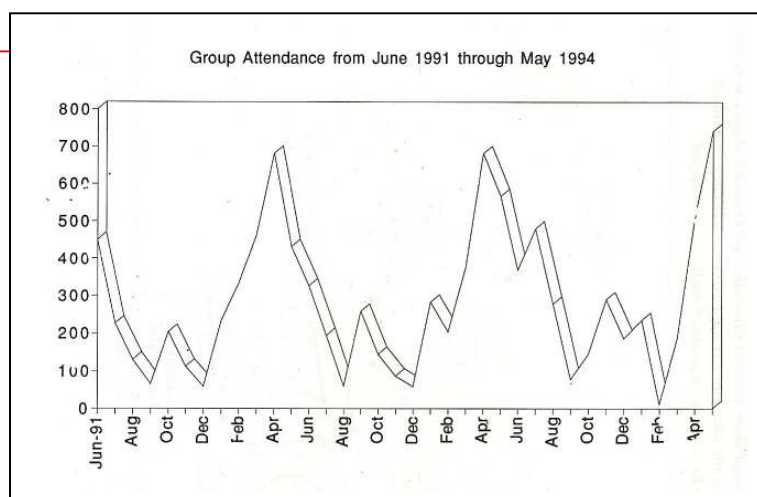
- B. Basic market profile – who are the visitors, where are they traveling from, how long are they staying, gender and age variables, etc.
- C. Visitor experience desires or focus (why are they visiting this site?).
- D. Seasonal visitation trends or issues.
- E. School group and curriculum based interpretive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



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.

Volunteer Policies

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 .

<i>Volunteer Application for Natural Resources Agencies</i>		Instructions: Mark <input checked="" type="checkbox"/> 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																															
<p>7. Which general volunteer work categories are you most interested in?</p> <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Archeology</td> <td><input type="checkbox"/> Historical/ Preservation</td> <td><input type="checkbox"/> Soil/ Watershed</td> </tr> <tr> <td><input type="checkbox"/> Botany</td> <td><input type="checkbox"/> Pest/Disease Control</td> <td><input type="checkbox"/> Timber/Fire Prevention</td> </tr> <tr> <td><input type="checkbox"/> Campground Host</td> <td><input type="checkbox"/> Minerals/ Geology</td> <td><input type="checkbox"/> Trail/Campground Maintenance</td> </tr> <tr> <td><input type="checkbox"/> Construction Maintenance</td> <td><input type="checkbox"/> Natural Resources Planning</td> <td><input type="checkbox"/> Tour Guide/Interpretation</td> </tr> <tr> <td><input type="checkbox"/> Computers</td> <td><input type="checkbox"/> Office/Clerical</td> <td><input type="checkbox"/> Visitor Information</td> </tr> <tr> <td><input type="checkbox"/> Conservation Education</td> <td><input type="checkbox"/> Range/Livestock</td> <td><input type="checkbox"/> Other (Please specify)</td> </tr> <tr> <td><input type="checkbox"/> Fish/Wildlife</td> <td><input type="checkbox"/> Research/Librarian</td> <td></td> </tr> </table>				<input type="checkbox"/> Archeology	<input type="checkbox"/> Historical/ Preservation	<input type="checkbox"/> Soil/ Watershed	<input type="checkbox"/> Botany	<input type="checkbox"/> Pest/Disease Control	<input type="checkbox"/> Timber/Fire Prevention	<input type="checkbox"/> Campground Host	<input type="checkbox"/> Minerals/ Geology	<input type="checkbox"/> Trail/Campground Maintenance	<input type="checkbox"/> Construction Maintenance	<input type="checkbox"/> Natural Resources Planning	<input type="checkbox"/> Tour Guide/Interpretation	<input type="checkbox"/> Computers	<input type="checkbox"/> Office/Clerical	<input type="checkbox"/> Visitor Information	<input type="checkbox"/> Conservation Education	<input type="checkbox"/> Range/Livestock	<input type="checkbox"/> Other (Please specify)	<input type="checkbox"/> Fish/Wildlife	<input type="checkbox"/> Research/Librarian										
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<input type="checkbox"/> Fish/Wildlife	<input type="checkbox"/> Research/Librarian																																
<p>8. What qualifications/skills/experience/education do you have that you would like to use in your volunteer work?</p> <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Backpacking/Camping</td> <td><input type="checkbox"/> Heavy Equipment Operation</td> <td><input type="checkbox"/> Sign Language</td> </tr> <tr> <td><input type="checkbox"/> Biology</td> <td><input type="checkbox"/> Horses – Care/ Riding</td> <td><input type="checkbox"/> Supervision</td> </tr> <tr> <td><input type="checkbox"/> Boat Operation</td> <td><input type="checkbox"/> Landscaping/Reforestation</td> <td><input type="checkbox"/> Other Trade skills (Please specify)</td> </tr> <tr> <td><input type="checkbox"/> Carpentry</td> <td><input type="checkbox"/> Land Surveying</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Clerical/Office Machines</td> <td><input type="checkbox"/> Livestock/Ranching</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Computer Programming</td> <td><input type="checkbox"/> Map reading</td> <td><input type="checkbox"/> Teaching</td> </tr> <tr> <td><input type="checkbox"/> Drafting/Graphics</td> <td><input type="checkbox"/> Mountaineering</td> <td><input type="checkbox"/> Working with People</td> </tr> <tr> <td><input type="checkbox"/> Driver's License</td> <td><input type="checkbox"/> Photography</td> <td><input type="checkbox"/> Writing/Editing</td> </tr> <tr> <td><input type="checkbox"/> First Aid Certificate</td> <td><input type="checkbox"/> Public Speaking</td> <td><input type="checkbox"/> Other (Please specify)</td> </tr> <tr> <td><input type="checkbox"/> Hand/Power Tools</td> <td><input type="checkbox"/> Research/Librarian</td> <td></td> </tr> </table>				<input type="checkbox"/> Backpacking/Camping	<input type="checkbox"/> Heavy Equipment Operation	<input type="checkbox"/> Sign Language	<input type="checkbox"/> Biology	<input type="checkbox"/> Horses – Care/ Riding	<input type="checkbox"/> Supervision	<input type="checkbox"/> Boat Operation	<input type="checkbox"/> Landscaping/Reforestation	<input type="checkbox"/> Other Trade skills (Please specify)	<input type="checkbox"/> Carpentry	<input type="checkbox"/> Land Surveying		<input type="checkbox"/> Clerical/Office Machines	<input type="checkbox"/> Livestock/Ranching		<input type="checkbox"/> Computer Programming	<input type="checkbox"/> Map reading	<input type="checkbox"/> Teaching	<input type="checkbox"/> Drafting/Graphics	<input type="checkbox"/> Mountaineering	<input type="checkbox"/> Working with People	<input type="checkbox"/> Driver's License	<input type="checkbox"/> Photography	<input type="checkbox"/> Writing/Editing	<input type="checkbox"/> First Aid Certificate	<input type="checkbox"/> Public Speaking	<input type="checkbox"/> Other (Please specify)	<input type="checkbox"/> Hand/Power Tools	<input type="checkbox"/> Research/Librarian	
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<input type="checkbox"/> Hand/Power Tools	<input type="checkbox"/> Research/Librarian																																
<p>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)</p> <p>_____</p>																																	
<p>10. Are you a United States Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No (If no, additional information may be required)</p>																																	

<p>11. a. Have you volunteered before? <input type="checkbox"/> Yes <input type="checkbox"/> No b. If Yes, please briefly describe your volunteer experience.</p>
<p>12. Would you like to supervise other volunteers? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>13. What are some of your objectives for working as a volunteer? (Optional)</p>
<p>14. Please specify any physical limitations that may influence your volunteer work activities:</p>
<p>15. a. Which months would you be available for volunteer work?</p> <p><input type="checkbox"/> January <input type="checkbox"/> February <input type="checkbox"/> March <input type="checkbox"/> April <input type="checkbox"/> May <input type="checkbox"/> June <input type="checkbox"/> July <input type="checkbox"/> August <input type="checkbox"/> September <input type="checkbox"/> October <input type="checkbox"/> November <input type="checkbox"/> December</p> <p>15b. How many hours per week would you be available for volunteer work? Hours</p> <p>15c. Which days per week would you be available for volunteer work?</p> <p><input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday <input type="checkbox"/> Sunday</p>
<p>16. Specify at least three states or specific locations within a state where you would like to do volunteer work.</p>
<p>17. Specify your lodging needs:</p> <p><input type="checkbox"/> I will furnish my own lodging (such as tent; camper; own, relative's, or friend's place) <input type="checkbox"/> I will require assistance in finding lodging</p>
<p>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?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No (Please specify)</p>
<p>19. This is provided for more detailed responses. Please indicate the item numbers to which these responses apply:</p>
<p style="text-align: center;">Burden Statement</p> <p><i>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.</i></p>

The U.S. Department of Agriculture (USDA) and U.S. Department of the Interior prohibit discrimination in all programs and activities on the basis of race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital or family status. (Not all prohibited bases apply to all programs.) Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA's TARGET Center at 202-720-2600 (voice and TDD).

To file a complaint of discrimination, write USDA, Director, Office of Civil Rights, 1400 Independence Avenue, SW, Washington, DC 20250-9410 or call (800) 795-3272 (voice) or (202) 720-6382 (TDD). USDA and USDI are equal opportunity providers and employers.

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 = 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.
(as success).

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:

$$\frac{\text{Cost of Interpretive Programs/Services}}{\text{Number of visitors that receive the message}} + \text{The \% rate at which the objectives were accomplished.}$$

= 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 question 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"?

Help us give Swallow-wort the BOOT - a seedless one!

Pale Swallow-wort is a REAL problem – this non-native invasive plant (it came from Europe) can destroy habitats for our native plants and animals. We are working to contain the plant and keep it from spreading to other parks, communities or even your own backyard. The seeds can be easily stuck to your boots, shoes, clothing – even pet fur if your dog walks the trails with you. Learn to recognize the Swallow-wort plant and its seeds. Be sure to CHECK YOUR BOOTS and shoes for seeds before you leave and please use our boot and shoe cleaning stations in the parking lots. Help us give swallow-wort the boot – a *seedless one!*




© 2001 Eleanor Sanyal

The Swallow-wort in Spring and Summer – it can grow up to 6 feet a year and produces a soil chemical that kills other plants around it!

You are part of the solution to keep Swallow-wort from spreading to other locations. A few quick scrapes will do the trick. Look for seeds on your clothing and pets too. Thanks for helping to be part of our team.




Seeds can easily be stuck to your boots and shoes.



© 2001 Janet Nizwank

In the fall/winter the Swallow-wort looks like this. The white seeds are everywhere and this is the time we have to check our boots and clothes the most.



Robert G. Wehle State Park

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).

$$PAOT = \frac{8644}{8 \times 3} = 360 \text{ people at one time at your busiest time.}$$

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.

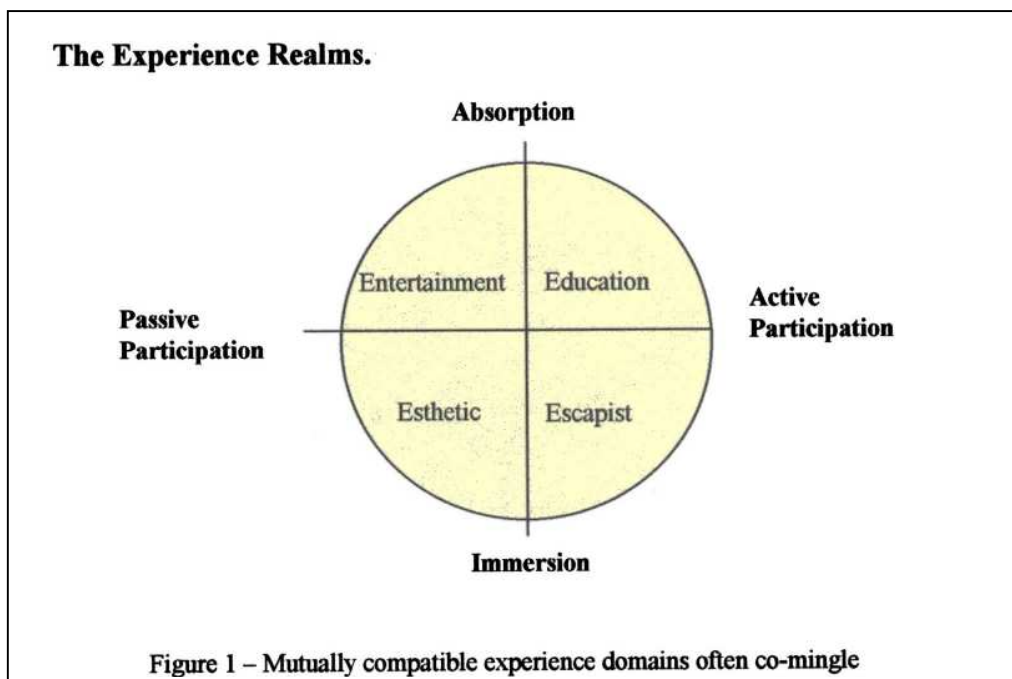
Moving forward while standing still? In preparation for developing this chapter on new cutting-edge approaches to interpretive planning, I spent some time looking through the now many text books on interpretation to see “what was new”. What I found was new ways of saying “old ideas”, or more complex 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.



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.

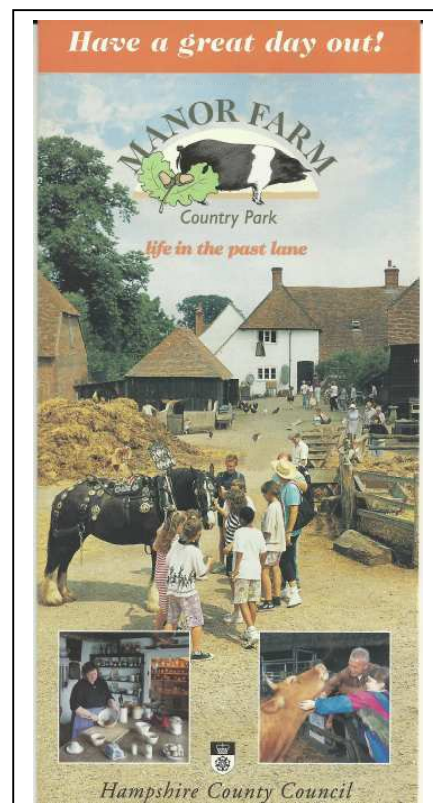
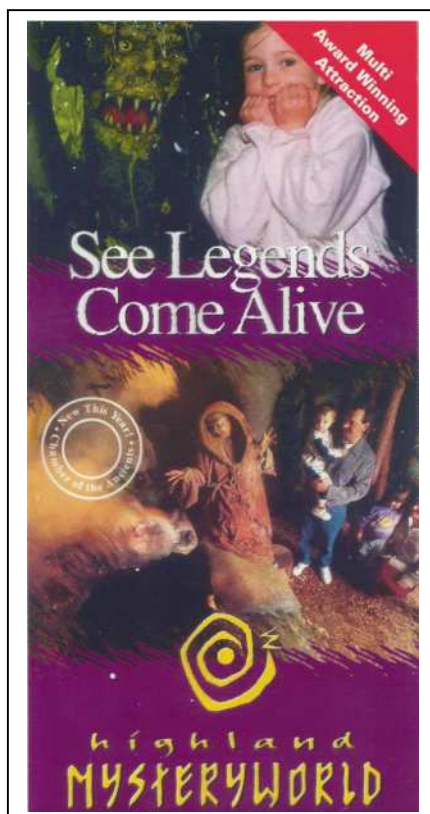
To me this is one of the most important aspects of any interpretive plan – what experiences do you offer, or want to offer? We do an experience inventory as part of the total plan interpretive inventory to address this issue and how it may affect current or future visitation or market shifts.

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 planning. “ 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.

- 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

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.

