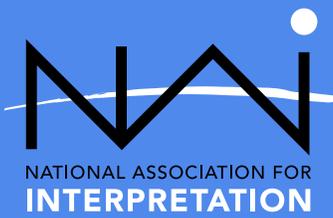




# National Association for Interpretation

2016 ANNUAL REPORT





NATIONAL ASSOCIATION FOR  
**INTERPRETATION**

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**NAI's mission** is to inspire leadership and excellence to advance heritage interpretation as a profession.

**Interpretation** is a mission-based communication process that forges emotional and intellectual connections between the interests of the audience and the meanings inherent in the resource.

# 2016 Annual Report

The National Association for Interpretation (NAI) is a nonprofit 501(c)3 educational association serving the field of heritage interpretation. Founded in 1988, its mission has been to inspire leadership and excellence to advance heritage interpretation as a profession. There are almost 6,000 members in the USA, Canada, and 31 other countries. The organization has ten regional and six special-interest organizational units to better serve its members.



NAI's strategic plan entered its second year of implementation in 2016. It has served as a road map for staff and board initiatives and provides the framework for NAI's annual operations plan. NAI is on track, addressing the key strategic goals identified in this five-year plan.

Our primary focus for national office staff and resources throughout the past year has been implementing the new system of database integration. Staff has been working with our technology implementer to fine-tune the association management database system (iMIS, installed in 2012) in order to integrate the certification program into the membership database and streamline and automate the certification processing procedures. Despite delays caused by a system-wide updating of the software, the new process was in place and being tested as 2015 came to a close. All national CIG and CIH classes are now registered and processed online.

The system went live December 1, 2015, and for the first half of 2016 staff in all departments worked to trouble-shoot the new processes and to adjust the administration of the certification program to better meet the needs of both students and trainers. We hired a new Certification and Training Office Administrator and with additional clerical support we were able to bring class processing time to under 30 days and clear a backlog of pending courses.

In training, our five Master Trainers continued to help staff conduct classes throughout the country—six CIGT classes and three CIHT classes. In addition, the new Process of Interpretive Planning course, initiated in 2015 and first conducted in 2016, was taught three times to rave reviews. We also conducted two Social Media and Graphic Design classes in Sacramento, California, and Charlotte, North Carolina, and three Coaching Interpreters Workshops in Oakland, California, Washington, DC, and Chicago, Illinois. In addition, our Certification and Training Manager participated in an extensive training program sponsored by the U.S. Forest Service in the Ukraine, where she taught 15 CIG students and met with others to advise on the creation of a certification program in Ukraine using the NAI model. She conducted an additional weeklong training to 35, non English-speaking interpreters increasing their proficiency in both personal and nonpersonal skills.

NAI conducted 17 webinars throughout the year. In the fall of 2016 NAI entered into a formal partnership with the Eppley Institute for Parks and Public Lands, which resulted in the integration of two online interpretation courses by the end of 2016. Looking ahead, NAI created a new Interpretation Standards Task Force, now tasked

with revising and updating national interpretive standards.

NAI held two successful training conferences for interpreters in the past year: the national conference in Virginia Beach, Virginia, in November 2016 (616 registrants) and an international conference held in Wellington, New Zealand, in March 2016 (131 delegates from 12 countries). The international conference was done in partnership with Interpretation Network New Zealand, and focused on the interpretation of native cultures. The topic of interpretive standards was also in play at these conferences, as well as ongoing discussions on the creation of an international alliance of interpretive associations.

Some advancements were also made in improving both our website and the membership “My Account” side of the iMIS database to make member interaction with NAI a better experience. We automated membership and certification renewal notices, some welcome and thank-you letters, registration confirmations, webinar instructions to participants, and updated NAI’s “Join Online” membership application feature. 2016 saw the creation of Online Communities to allow groups of members enhanced communication ability with one another and shared work capabilities (we will be expanding Communities in 2017).

NAI’s organizational units (OUs) form the structure of the organization. NAI’s national office is committed to providing the training and services that OU leadership need to succeed with their members. NAI had a national staff member present at all of the regional conferences held in 2016 in order to improve communications and to present the many ways that the national office can be of assistance. Training sessions

were held at the national conference for those present, and an accounting webinar is on our website. Webinars on membership and event planning will be added in 2017.

The *Journal of Interpretation Research* was created to serve as a promoter of, and outlet for, important research in the field of interpretation. For many years it has served this role admirably, but with advances in technology and the demands of newer generations of academics it had fallen somewhat short in being the flagship publication for NAI that was originally envisioned. Working with the *JIR* editor, staff worked to bring the Journal into the 21st century by making it an online, searchable publication readily accessible to users that meets the needs of academics as well as those in the field who look to research to inform best practices. We began a campaign to encourage submissions and that campaign will continue into 2017.

2016 saw several opportunities emerge to advance our goals in advocacy, including the opportunity to take leadership roles within the museum Council of Affiliates and the American Association for State and Local History, advancing our plan to enhance NAI’s visibility and participation in the museum and history fields with the ultimate goals of increasing recognition of the interpretive profession and expanding our member base into these fields. Our participation in the Seminar for Historic Administration has also yielded an increased visibility and respect within the history field, and led to an increased role for interpretation in the prestigious three-week residential seminar.

This year NAI was requested to be part of the History Relevance Campaign, and participated in discussions concerning the establishment of common metrics that history organizations could use to

measure the degree to which they are achieving their mission. We are working to see the metrics that measure the importance of professional interpretation in promoting the relevance of history to visitors are included so that we will have a broad base of quantitative data we can use for future advocacy efforts (and serve as a model for the adoption of similar broad-based, common metrics in visitor evaluations for natural environment interpretive sites).

With the growth of our certification program, NAI was in need of more staff in 2016. With a limited budget for administration, we were able to locate community partners providing employment training interns at low- or no-cost. This includes the Larimer County Workforce Development Program, the SER Senior Community Service Employment Program, and the Student Work/Study Program at Colorado State University. These partnerships have been successful, providing NAI with talented and dedicated part-time staff.

*Amy Lethbridge, President*  
*Margo Carlock, Executive Director*

### **Financial Year in Review**

External auditors Brock and Co., CPAs, reported NAI revenue at \$1,436,174 for 2016 with expenses of \$1,404,125, resulting in a surplus of \$32,049. The organization’s net assets at the end of 2016 were \$518,830, up from \$486,781 at the end of 2015. Deferred revenue at the end of 2016 was \$373,162, compared to \$318,574 in 2015. NAI’s total assets are valued at \$1,220,703, down from \$1,149,031 in 2015.

ON THE COVER: NAI partnered with the Interpretation Network New Zealand for its 2016 International Conference.



Toya Jervay, Jess Niven-Kohring, Parker McMullen Bushman, and Marissa Llanes at NAI 2016 in Corpus Christi, Texas.

## Membership

Changes to the CIG and CIH structure in late 2014/early 2015 gave us the ability to better serve those receiving membership with their certification. Instead of waiting until their course was fully processed, those paying online now get their membership within days of signing up for the course, allowing us to provide earlier benefits and better service to this set of new members. Membership numbers remained consistent with those seen in 2015, as we averaged more than 5,500 members at the end of each month (up from the average 5,100 in 2014). We ended the year with a tie for our all-time high end-of-month number of just over 5,700 members.

## Certification & Training

2016 was a year of transition and change for our Certification and Training department. First, this year marked the initial implementation of the iMIS module for certification. On the most basic level, this resulted in a change for all students who attended a certification workshop and for our instructors, as NAI started collecting all revenue and registration for courses online. Additionally, everyone who certified as a CIG or CIH was given a complimentary, one-year membership with their certification and the fees for CIG and CIH were raised for the first time since 1998. Furthermore, a decade-long staff member for C&T had resigned in late 2015 which resulted in us hiring Kathy Evans to take her place.

Aside from policy and personnel changes, a total of 265 certification courses inspired leadership and excellence in interpreters in the United States and around the world. The NAI national office offered 15 professional-level courses throughout the United States and internationally, including six Certified Interpretive Guide Train-the-Trainer (CIGT) courses, three Certified Interpretive Host Trainer (CIHT), and three Process of Interpretive Planning courses to almost 200 participants.

Additionally, NAI expanded one of its stalwart offerings (Certified Interpretive Host Trainer) from a two-day, CIG Trainer prerequisite to two options for attendance, one being a new four day, non CIT course or the traditionally offered two-day option. This addition of a four-day option, allowed for twelve individuals who may not have certified otherwise being able to join the ranks of CIT.

NAI also offered non-certification professional development in the form of two two-day Social Interpretation workshops on graphic design and social media for interpreters. Furthermore, NAI offered its first new professional development workshop in many years, Coaching Interpreters Workshop. This three-day session focuses on building skills for interpreters in coaching and culminates with an authentic coaching session of a live program. This new workshop was offered three times in 2016 for a total of forty-eight participants.

NAI continued offering professional development opportunities through webinars, continuing to focus on one webinar per month for field interpreters and one for other professionals. Altogether nineteen webinars took place in 2016 with a total webinar attendance exceeding last year with 491 participants.

Finally, NAI-certified trainers offered 250 Certified Interpretive Guide (CIG) and Certified Interpretive Host (CIH) courses that took place all over the U.S. and world.

## National Conference

The 2016 NAI National Conference was held in Corpus Christi, Texas, November 8–12. Attendance, including exhibitors, was 648. Meetings and sessions were held at the American Bank Center, and there were over 100 breakout sessions.

Lodging was at two host hotels, the Holiday Inn Downtown and the Omni Corpus Christi Hotel. Our total room pickup was 1,325 room nights. The event featured keynote speakers, an exhibit hall, off-site sessions, special evening events, awards ceremonies, and concurrent sessions. Sponsors and partners were: NOAA, Community Nature Connections, East Bay Regional Park District, Corpus Christi Museum of Science and History, Mountains Recreational & Conservation Authority, Split Rock Studios, The Design Minds, OnCell, Riggs Ward Design, South Nevada Conservancy, Barking Dog Exhibits, Big Muddy Workshop, Wildlife Acoustics, Acorn Naturalists, iZone Imaging, KB Emblem Company, and Stone Imagery.

## International Conference

*Tihei Mauri Ora* (The Story Begins)—NAI International Conference was held April 3–7, 2016, in Wellington, Aotearoa New Zealand. The conference played host to 129 delegates, with over 46 educational sessions and featured two keynote addresses—Mr. Ethan Angelica of Museum Hack and Ms. Puawai Cairns, Curator Maori, Contemporary Culture.

## InterpPress

NAI's publishing imprint, InterpPress, features nine printed titles and four electronic/print-on-demand titles: *Personal Interpretation: Connecting Your Audience to Heritage Resources* (third edition) by Lisa Brochu and Tim Merriman (2015); *Interpretive Planning: The 5-M Model for Successful Planning Projects* (second edition) by Lisa Brochu (2014); *Meaningful Interpretation* edited by David L. Larsen (2011); *Establishing a Nature-Based Preschool* (eBook) by Rachel Larimore (2011); *Interpretive Solutions: Harnessing the Power of Interpretation to Help Resolve Critical Resource Issues* (eBook) by Michael E. Whatley, MS (2010); *Interpretive Perspectives: A Collection of Essays on Interpreting Nature and Culture* (eBook) by Larry Beck and Ted Cable (2010); *Putting Interpretation on the Map* (eBook) by Heidi Bailey (2009); *Interpretation By Design: Graphic Design Basics for Heritage Interpreters* by Paul Caputo, Shea Lewis, and Lisa Brochu (2008); *Applied Interpretation: Putting Research into Practice* by Doug Knapp (2007); *Interpretive Writing* by Alan Leftridge (2006); *The History of Heritage Interpretation* by Tim Merriman and Lisa Brochu (2006); *Management of Interpretive Sites: Developing Sustainable Operations Through Effective Leadership*, by Tim Merriman and Lisa Brochu (2005); *The Nature Center Book: How to Create and Nurture a Nature Center in Your Community* by Brent Evans and Carolyn Chipman Evans (2004)

NAI also published periodicals *Legacy* magazine (bi-monthly), the *Journal of Interpretation Research* (bi-annual), and a series of monthly emails.

We look forward to a bright 2017 and beyond! Thank you to all of our members, partners, and other supporters for helping us achieve our mission of inspiring leadership and excellence to advance heritage interpretation as a profession.

## 2016 NAI Donors

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# Financial Report

Prepared by Brock and Company, CPAs PC

## Statements of Activities and Changes in Net Assets

Years ended December 31

2016

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>Total</u>
<b>Revenues, Gains, and Other Support</b>				
Conferences and workshops	\$ 618,653	\$ -	\$ -	\$ 618,653
Certification	343,112	-	-	343,112
Membership	290,105	-	-	290,105
Publications and merchandise	84,135	-	-	84,135
Other revenue	42,743	-	-	42,743
Advertising	23,684	-	-	23,684
Public support	33,742	-	-	33,742
Net assets released from restrictions	-	-	-	-
Total revenues, gains, and other support	<u>1,436,174</u>	<u>-</u>	<u>-</u>	<u>1,436,174</u>
<b>Expenses</b>				
Program services	1,273,861	-	-	1,273,861
Support services				
Management and general	125,425	-	-	125,425
Fundraising	4,839	-	-	4,839
Total expenses	<u>1,404,125</u>	<u>-</u>	<u>-</u>	<u>1,404,125</u>
<b>Change in Net Assets</b>	<u>\$ 32,049</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 32,049</u>
<b>Net Assets (Deficit), Beginning of Year</b>	\$ (215,082)	\$ -	\$ 701,863	\$ 486,781
Change in net assets	<u>32,049</u>	<u>-</u>	<u>-</u>	<u>32,049</u>
<b>Net Assets (Deficit), End of Year</b>	<u>\$ (183,033)</u>	<u>\$ -</u>	<u>\$ 701,863</u>	<u>\$ 518,830</u>

# Statements of Financial Position

December 31	2016	2015
<b>ASSETS</b>		
<b>Current Assets</b>		
Cash and cash equivalents	\$ 176,887	\$ 41,101
Accounts receivable	27,468	65,827
Inventories	123,746	123,746
Prepays and other current assets	26,045	14,399
Total current assets	<u>354,146</u>	<u>245,073</u>
<b>Property and Equipment, at cost</b>		
Land	150,000	150,000
Buildings and improvements	963,987	963,987
Equipment and software	191,631	191,631
Furniture and fixtures	48,439	48,439
	<u>1,354,057</u>	<u>1,354,057</u>
Less accumulated depreciation	(487,500)	(450,099)
Net property and equipment	<u>866,557</u>	<u>903,958</u>
Total assets	<u>\$ 1,220,703</u>	<u>\$ 1,149,031</u>
<b>LIABILITIES, DEFERRED REVENUE AND NET ASSETS</b>		
<b>Current Liabilities</b>		
Accounts payable	\$ 28,587	\$ 27,483
Current maturities of long-term debt	26,320	25,004
Accrued compensation and payroll taxes	24,012	17,273
Other accrued liabilities	37,705	35,503
Total current liabilities	<u>116,624</u>	<u>105,263</u>
Long-Term Debt, net of current maturities	<u>212,087</u>	<u>238,413</u>
Total liabilities	<u>328,711</u>	<u>343,676</u>
Deferred Revenue	<u>373,162</u>	<u>318,574</u>
<b>Net Assets (Deficit)</b>		
Unrestricted	(183,033)	(215,082)
Permanently restricted	701,863	701,863
Total net assets	<u>518,830</u>	<u>486,781</u>
Total liabilities, deferred revenue and net assets	<u>\$ 1,220,703</u>	<u>\$ 1,149,031</u>



NAI 2016 in Corpus Christi, Texas,  
explored the Gulf of Mexico



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