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We wish to thank the NAI Board of Directors for their support in the development of the certification and training programs that led to the development and reprinting of this workbook.

Over 1,000 individuals have participated in Certified Interpretive Trainer classes since we began teaching them in January 2001 through May 2012 when this revision was completed. These creative people have been invaluable in suggesting improvements and changes to the material in the Certified Interpretive Guide curriculum. We value their input and have incorporated many of their suggestions in this fourth edition of the CIG workbook. We will continue to upgrade the program and keep current with the latest research and information related to the field to ensure that CIG students remain on the cutting edge of best practices in interpretive communication.

We thank Mickey Schilling for the illustrations in this workbook and acknowledge the excellent design skills of NAI’s art director, Paul Caputo. And finally, we’d like to thank the individuals and agencies who allowed us to use their materials and ideas as examples of excellence in the development of the Certified Interpretive Guide training course, and express our appreciation for all the outstanding authors and trainers whose work continues to be an inspiration, with special gratitude to Wren Smith, Kelly Farrell, Jay Miller, Sam Ham, Ted Cable, Douglas Knudson, Larry Beck, Roger Riolo, Denise Dowling, and the National Park Service, especially Dave Dahlen and David Larsen.

—Lisa Brochu and Tim Merriman
Annotated Instructor Workbook
This workbook includes tips on teaching the various concepts in the CIG curriculum. These tips are not intended to put limits on how you teach the concepts – instead, they’re simply intended to pique your creativity and help you see how others might approach the same concept.

Remember that you can alter the order in which you teach this class—spend as much or as little time on any one concept as you need to depending on the makeup of your class, as long as you touch on each of the main points.

Have a wonderful class and thanks for all the good work you’re doing on behalf of NAI and the profession of interpretation.
Room Setup Tips

1. A u-shape works best if you have the room to set up this way. Don’t forget toys and snacks (chocolate and nuts are always appreciated on the table; fruit and some sort of carbs are also good on the snack table).
2. You’ll need a table up front to put your supplies and materials on, as well as an easel. Post-it pad flip charts are preferable so that you can put them up around the room and let people refer back to them during the week.
3. If your group has a tendency to get off track, you might want to post a “parking lot” where you can record issues that should be discussed at a later time.
4. If you plan to use the powerpoint slides, be sure the room can be darkened.
5. If you don’t know everyone’s name (or if they don’t know each other), be sure to provide easily seen nametags.

Instructor Notes

1. Briefly identify yourself. Welcome everyone to the class. Make sure everyone has proper materials. Go over classroom rules (no smoking, etc.); location of restrooms, telephone, water, breaks, lunch, etc.; and agenda.
2. Use an introductory exercise to have everyone get to know each other better, even if they already know each other’s names. For example:
   - Have pairs of students interview and introduce each other.
   - Give everyone a colored M&M – in addition to providing their name and what their job is, those with blue M&Ms would say their favorite pet; reds would say their favorite vacation spot; yellows would give their favorite quote, etc.
   - After all the introductions are made, make the point that everyone has a story to tell, just like every object or concept we interpret has a story behind it.

What to Expect

Ever notice how some people seem to be natural storytellers? Others just seem to have a way of handling people and making them comfortable, and still others are able to explain just about anything to anybody in a way that makes sense. All of these elements and more are involved in the art of interpretation.

And while it’s true that some people are simply born interpreters, for the rest of us, it’s also true that almost anyone can learn enough about interpretive techniques to improve the way they communicate with others.

The purpose of this workshop is to introduce you to basic principles of interpretation and to coach you in the application of those principles. By the end of the workshop, you should have a good understanding of what makes interpretation different from delivering a memorized speech and why an interpretive approach may be more effective for communicating with your audience.

As the workshop progresses, you will have opportunities to demonstrate your newfound knowledge. If those demonstrations meet certain criteria, your efforts will be recognized as you become an NAI Certified Interpretive Guide (CIG).

We hope you enjoy the workshop. Please be sure to let us know how we can improve it for future workshop participants.
Instructor Notes

1. Go over objectives for the class. Ask why they came or what they hope to gain from the class and record what they say on a flip chart that you can post. You can use the posted notes to reflect on whether you're meeting their expectations during the class.

2. Have students complete the first three sentences of the worksheet on page 5 in the student workbook. Ask for volunteers to share what they’ve written. At the end of the week, have them revisit this page and complete the final sentence of the worksheet before filling out their evaluations.

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In Your Own Words

**personal goals...**

I’m taking this class because:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

As a result of this class, I’d like to:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Within ____ years, I expect to:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What I’ve learned this week will help me achieve my goals by:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Welcome to the world of interpretation.

What makes interpretation a profession?
Interpretation can be informal and spontaneous. Or it can be carefully structured to elicit specific responses. Or it can be a combination of both of these approaches. But interpretation is more than a simple act of communication. It is based on theory that draws from many disciplines. The theoretical base is supported by a body of ongoing research, which has resulted in an accumulation of knowledge about the art and science of interpretation. That knowledge can be applied to the practice of interpretation.

Over the course of many years, standards have been developed that define the profession of interpretation. Those standards are established by the National Association for Interpretation, the professional organization for those who practice interpretation.

More information about NAI, the certification program, and other products and services is available on our website, www.interpnet.com.

Instructor Notes
1. Discuss what constitutes a profession and how interpretation fits into that classification. Emphasize that individual responsibility is one of the more important tenets of professionalism. Each person who earns the CIG credential represents the profession as well as their own credibility.

2. The Making of a Profession (points to make)
   • provides public service with social responsibility
   • based on foundation of researched knowledge
   • requires specialized education and training
   • has certification programs
   • supports an established code of ethics

3. Talk about the history of the profession. You might want to set up a timeline on a long sheet of butcher paper. Divide the timeline into centuries (19th, 20th, 21st) and decades within those centuries. Prepare some stickie notes with major historical events and ask students to place those on the timeline. Then have the students add stickie notes that directly relate to interpretation (establishment of National Park Service, John Muir’s writings, quotes from major contributors to the field, etc.). This approach helps put the history of interpretation into an overall historical context. At the end of the timeline, emphasize that the students will be making their own contributions to the history of interpretation in the future.

4. You could also have the students sit on the floor in a “campfire circle.” Use objects to represent some of the storytellers, shaman, priests, books from John Muir and Enos Mills, and other individuals who could represent the history of interpretation. As you discuss each one, place the object around the circle interspersed with the students, so that all become part of the same circle.

5. Give a brief introduction to NAI’s history. Began in 1954 as Association of Interpretive Naturalists and in 1963 as Western Interpreters Association; these two merged in 1988 to become NAI. In 2012, had over 5,370 members in 33 countries.

6. Ask if any individuals are current members. They are likely to answer no, but remind them that they have the option to become members at any time (and some may have joined to get the lower certification fee). Explain the benefits associated with that membership. Be clear that being a member of NAI is not a requirement for certification and that they could pay the nonmember fee and become certified without becoming a member.
Interpretive guides may include:
- tour guides
- river guides
- museum docents
- volunteers
- seasonal employees
- cruise directors
- naturalists
- zoo docents
- park rangers
- costumed interpreters
- bus driver guides

The interpretive profession in the United States includes more than the estimated 30,000 people who are full-time paid professionals. Most institutions and agencies use volunteers, new hires or seasonal workers as front-line interpreters, also known as interpretive guides. A conservative estimate of the number of guides may be 300,000 to 500,000. But even more people have public contact at interpretive sites, though they don't deliver programs or lead tours. These 2 to 5 million people, characterized as interpretive hosts, might include receptionists, clerks, security personnel, maintenance workers, campground hosts, and others. Each person who comes in contact with the public at an interpretive site can be considered an interpreter, making each contact an interpretive opportunity.

Certified Interpretive Guide Training Workbook
NAI’s Certification Program

The National Association for Interpretation (NAI) offers a professional certification program to recognize individuals who exhibit knowledge and skills necessary to ensure quality interpretive services to all audiences. Certification is available in six categories:

**Professional categories**
- Certified Interpretive Manager (CIM)
- Certified Interpretive Trainer (CIT)
- Certified Interpretive Planner (CIP)
- Certified Heritage Interpreter (CHI)

**Training categories**
- Certified Interpretive Guide (CIG)
- Certified Interpretive Host (CIH)

**What is the CIG program?**
The Certified Interpretive Guide category is designed for people who have not had previous opportunities to complete the experience or education required for certification in the four professional categories. The CIG program offers an opportunity for guides to receive training in interpretive techniques and then be acknowledged with an internationally recognized certification.

**What’s the difference between this certification category and the other categories?**
The CIG category offers recognition of a basic understanding of interpretive techniques and ability to apply those techniques to guided talks and informal situations. This category is most likely to be used by entry-level guides, seasonal or temporary employees, people changing jobs, and anyone who wants to be sure they have a sound background in interpretive principles. The CIH category offers training in customer service and informal interpretation for those who have public contact but don’t deliver programs or lead tours. The other four categories are designed to recognize a professional commitment to interpretation and have additional experience or education criteria as minimum qualifications.

**How do I achieve CIG status?**
You must complete this 32-hour course, pass a required literature review with a score of 80 percent or better, and demonstrate proficiency in a practical application of interpretation.

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**Instructor Notes**
1. Briefly describe the certification program and offer to answer any questions. Use the Certification Handbook and Study Guide (Tab 3) as a resource. If you still can’t find the answer, contact NAI at 888-900-8283 as soon as possible.
2. Talk about the benefits of certification:
   - to the profession
     - encourages high performance standards
     - encourages professional behavior
     - supports peer-reviewed research
     - continuously improves the profession
     - offers peer review to certifying professionals
   - to the employer
     - increases credibility with customers
     - provides economic benefits
     - promotes employee loyalty
     - taps into NAI network
   - to the individual
     - builds credibility
     - encourages lifelong learning
     - increases promotion potential
     - offers sense of pride in achievement
     - increases performance effectiveness
Instructor Notes

1. Be sure to cover recertification requirements and procedures.
2. If you have no one in your class who is attempting certification, it’s still a good idea to discuss the topic and let them know they can do this if they wish and if they complete all the requirements successfully.
3. It’s also a good idea to have extra certification packets on hand in case some students who thought they didn’t want the credential change their mind after your first morning. They cannot change their mind the last day after having completed everything or send in paperwork after the other students in your class. The certification fee is an APPLICATION fee, it does not guarantee that they will pass everything and be certified.
4. Show a sample certification packet (what they will get when they complete the certification. If you don’t have one, ask Carrie at the national office to supply a sample to you – one per instructor). Contents include:
   - frameable certificate
   - letter from NAI president
   - leather business card wallet
   - CIG logo (slick paper or electronic version on request)
   - CIG logo lapel pin.
5. Introduce the texts required for the literature review (avoid calling it an exam) and remind the students that the purpose of this is not to test their knowledge but to help them learn that there are valuable written resources available to them.
   - *Interpreting Our Heritage* by Freeman Tilden
   - *Gifts of Interpretation* by Larry Beck & Ted Cable
   - *Personal Interpretation* by Lisa Brochu & Tim Merriman
   - *Interpretation: Making a Difference on Purpose* by Sam Ham
6. Provide tips on completing the literature review, but do not coach the answers – you may steer them to the wrong answer.
   - Read each question several times to be certain you understand it.
   - Discussing answers with colleagues is reasonable and valuable.
   - Have a colleague review your paper to make sure you answered every question.
   - Passing grade is 80%.
   - People who do not take the time to look up the answers generally do not pass.

What’s the benefit of CIG status?
The CIG program will enhance your communication skills and may help you develop a competitive edge in the tourism industry.

Can I apply my CIG status to one of the other professional certification categories?
If you hold a valid CIG certificate, you may apply for certification in other categories once you meet the minimum qualifications for those categories (visit www.interpnet.com for details on minimum qualifications for other categories), but the CIG credential does not exempt you from completing all requirements for any other category.

Does CIG status last a lifetime?
No. Once certified, you can renew your certification every four years if you continue your education by attending college courses or NAI-approved training. NAI recognizes training by many sources, including professional organizations, agencies, seminars, and other professional trainers. Documentation of continued education or participation in training opportunities is the responsibility of the applicant. Forty hours of additional professional development is required. Suggested sources for recertification requirements can be found at www.interpnet.com.

What if I don’t pass the CIG course?
There are four elements involved in passing the CIG course to achieve certification:

1. Participate fully in each of the 32 hours of class.
2. Prepare a presentation outline.
3. Make a ten-minute presentation to the class.
4. Take a required literature review.

Each of the last three elements must be passed with a score of 80 percent or better. If you do not achieve an 80 percent score on any of these elements, you can resubmit that element to the trainer within 90 days with no additional fee or training requirement (resubmittal of your presentation may require you to videotape it). If you wait beyond the 90-day limit or do not pass on the second attempt, you must pay the application fee and retake the 32-hour training course to attempt certification again.
Instructor Notes

1. Definition: A mission-based communication process that forges emotional and intellectual connections between the interests of the audience and the meanings inherent in the resource.

2. Discuss the definition of interpretation. Ask students to suggest key words – what they think interpretation is. Make a list on a flipchart or blank overhead as each word is offered. Then circle the ones common to the NAI definition emphasizing that making connections, revealing meanings, and interests of the guest or visitor are common elements of most definitions and the essential elements of NAI’s preferred definition.

3. Refer back to the definition as you go through the next few pages and exercises as they help amplify the concepts of the meaning behind resources, and making emotional/intellectual connections.

Interpretation Defined

What are the essential components of interpretation?

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.

— National Association for Interpretation (2007)
Instructor Notes

1. Place an empty beer bottle in a brown paper bag (a chocolate chip cookie works equally well if you’re dealing with social or cultural issues that might be too sensitive to alcoholism). Pass the bag with bottle from one person to another asking each to give one word to tell WHAT IT MEANS to them. Record these on a flipchart until each person has given a meaning. Discuss how diverse the meanings can be from such a simple item and how some meanings are very negative and others are positive. Some are neutral. Our audience brings their experiences to each program and the meanings they take may not be what we intended. If we want to reveal meanings we must be aware of how varied their reactions might be to our messages.

2. Take a Walk on the Splenium – ask students to close their eyes and imagine that their brain is the lobby of a hotel. On the left, the door is a massive oak door like a giant library and inside are the volumes of things they have learned or memorized in school. Have them take a moment to review the titles on the volumes in their head silently and then move to the right side where the door looks like the entrance to a nightclub or the holodeck from Star Trek. In here are the experiences they’ve had. Ask them to reflect on something that happened when they were very young (maybe even pre-speech) and then on something that made a vivid impression – remind them not to go anywhere scary or distressing with this. Have them open their eyes and share what they saw in each of the sides. Talk about the differences in left and right brain experiences and correlate that to the definition’s use of emotional and intellectual connections.

How People Process Information

Two Brains Per Person

Everybody has two sides to the brain, but some people tend to rely on one side more than the other. Most effective presentations engage both sides of the brain.

The care of rivers is not a matter of rivers, but of the human heart.

—Tanaka Shozo
Instructor Notes

1. Select a common object with a more profound story behind it. A piece of the Berlin wall is a great choice, but it could be the feather of an endangered species, or a quill used to sign a historic document, or a personal object of yours (make sure not to use something like a teddy bear that is universally recognizable as a touchstone). First pass the object and ask each person for a one-word DESCRIPTION of the object. List the words they come up with. Then tell the story behind the object very briefly – do not do a whole thematic presentation, just a short story about what the significance is. Then pass the item again and get another one-word about this object SIGNIFIES, listing the words next to your first list. Usually the first list will mostly be tangibles - rock, hard, gray. Knowing the story, they will come back with civilization, conflict, history, death, fear, isolation, which are mostly intangibles. Ask what the lists have in common, then describe what makes a “tangible” and what makes an “intangible.” Explain the value of connecting tangibles to intangibles. Explain that universals help any guest connect with the experience or story because they are “universal.” When we connect tangibles to intangibles in interpretation, we bring the audience to what Tilden referred to as the “whole story” reaching the “whole person.” Sam Ham teaches the same thing as “pragnanz.”

2. Have the group separate into several groups of three or four people and give each group a common item - pine cone, wire-rim glasses, feather, rock, piece of fabric, a stick, a leaf - whatever you can find in the local environment. Ask them to brainstorm tangibles and intangibles for their items and make two lists (use workbook page). It’s good to use things that are not typical “interpretive” items (such as a plastic spoon or a packet of sugar) to illustrate that the concept works with anything. Give them about ten minutes to generate their lists and then have each group read their lists. Ask them which of the concepts are the most universal. Encourage them to do the exercise again using an object that might be appropriate for their presentation at the end of the week.

3. Talk about the value of using universal concepts (connects to everyone).

4. String a clothesline across the room and have the students use this as a “continuum” of universal concepts. Use clothespins to attach a variety of words printed on index cards to the line ranging from “least universal” to “most universal.”

What Is This Thing?

Describe the object in the front of the room by listing words in the appropriate column.

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Circle the intangibles that seem to be the most universal.

Now do the same thing for your upcoming presentation. What tangibles and intangibles will you be using?

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10 National Association for Interpretation
Instructor Notes

1. Give a short presentation like the Bald Eagle one that follows. Or use your own brief presentation and prepare a handout that shows the tangibles and intangibles in your presentation. Use the diagram to illustrate the relationship between tangibles and intangibles, then have them try to think of several tangible-intangible links they may want to use in their own presentation.

2. Bald Eagle Presentation Example (see the following page for a suggested presentation script)
Bald Eagle Presentation Example

Good morning everyone. I'm delighted to see you this morning. I am very happy to be able to talk with you about bald eagles, the symbol of America in more than one way. How many of you have ever seen a bald eagle in the wild? Several of you. That's great. Do you remember that experience clearly? What was it like?

I will never forget my very first time. I was at Point Reyes Bird observatory in California working as a volunteer. I went down to the Sea Watch, a beautiful little birdwatching shelter that overlooks the beach below. The first thing that caught my eye were the seagulls flying in and out above the waves and landing on the beach to eat what they could find. It wasn't very long before I saw the unmistakable white head of the mature bald eagle cruising over the breakers below me. After just a few moments, I noticed the eagle swooping into the water with its bare legs and feet, and it came up with a writhing fish it caught. The eagle struggled to fly with the fish in its talons and it eventually landed near the shore on the sandy beach and began eating its prize catch. I was breathless from seeing this graceful bird I knew only from engravings on coins or movies.

Many years later I founded a raptor rehabilitation center in Pueblo, Colorado. I had occasion to see many bald eagles up close and personal. It was fascinating to note that their yellow legs and feet were bare and free feathers. Feathers on their upper legs stopped much higher than they do on the legs of the Golden Eagle, which has shaggy leggings down to their ankles. When you think about it that makes a lot of sense. The Golden Eagle hunts rodents like mice, kangaroo rats and small rabbits. If a rodent fights back and tries to chew on the feet of a golden eagle, they find feather, not flesh.

Think about the last time you cleaned your bathtub or washed your car. Did you wear swimming trunks are a heavy woolen coat? Obviously swimming trunks are a bit more comfortable when wet than a coat. The same thing is true for a bird hunting fish in shallow ocean. Imagine that golden eagle dragging those thick leggings in shallow water while trying to catch a fish. Bald eagles are well adapted for this behavior. You probably know they also eat carrion, dead animals. Bare legs are an advantage there as well. Golden's tend to kill and eat live prey only, so their feathered leggings are no disadvantage.

Bald eagles have adaptations that allow them to survive as fish predators and scavengers. They also build a magnificent nest, often dubbed the "great nest." It's great because it is so massive. They build in the crotch of a dead tree near water and they build very high up, over 40 feet usually. They do not breed until five years old or older when they get the fully white head. They breed for twenty years or more and may live to be fifty years old or older. That's very unusual for a bird. They add to the great nest each year, much like you do when building an addition to your home. It can weigh a ton or more with the sticks woven into a broad pad and it is perfect for holding the two or three young that a pair of eagles will have.

Eagles do eat carrion and that's another important survival adaptation. During periods when they are unsuccessful at catching fish, they have another way of feeding. However, they are adept at catching fish and virtually nothing feeds on bald eagles. They are at the top of the food chain. Small fish eat algae and zooplankton, one-celled plants and animals. Larger fish eat the smaller fish and bald eagles eat the larger fish. This makes the bald eagle a top carnivore.

Being a top carnivore has also been a disadvantage in recent years. At the end of World War II, the U.S. Government and private industry began using an innovative new class of chemical pesticides. DDT was the best known of the aromatic chlorinated hydrocarbons. They were deadly to insects but seemingly had very little effect on large animals. We hoped that DDT would be our salvation for problems like malaria and it was sprayed over wetlands by the ton to control mosquitoes and other undesirable insects.

However, by the late 1960s there was beginning to be ample evidence that DDT was not as harmless to larger animals as we had hoped. Bald eagles, osprey, pelicans and red-shoulder hawks were found to be laying eggs with thin shells. The eggs would break during incubation by parent birds or they would dry out from lack of a protecting shell. In either case the nests failed. No babies were being born to these birds of prey. Scientists studied the problem and determined that each of these species of birds had high concentrations of DDT in the fat in their bodies. They are all top carnivores and feed on animals that eat other animals that eat plants. That process concentrates DDT because it stays in the fat of each animal. A bald eagle that eats a fish will retain the DDT from that fish and every fish it has eaten. This bio-concentration phenomenon resulted in danger to many birds, but especially those that eat fish or snakes.

At about this same time legislators were hearing concern from both biologists who study birds and the general public. Can you imagine the symbol of freedom in America becoming extinct? It was not a picture of the future we relished. Since the 1930s it had been known by scientists that eagle populations were declining. The Bald Eagle Act of 1940 was an attempt at protecting them. Congress heard the pleas of scientists and common folks and passed a number of laws that gave hope for bald eagles, ospreys, pelicans and red-shouldered hawks. In 1973 the Endangered Species Act was passed. The bald eagle was finally placed on the U.S. Endangered Species List on July 4, 1976, just two hundred years after the birth of the nation.

Will our grandchildren see bald eagles? Obviously now the answer is a resounding “YES!” By the year 2000 the U.S. Fish and Wildlife Service reported that bald eagle numbers had recovered to more than 50,000 adult birds. Bald eagles were once again building great nests along America's rivers, lakes and seashores. They are now seen in group roosts of dozens of adult birds in the winter. In the summer active eagle nests are evident at traditional nest sites as well as at new places where they were not seen before.

Habitat protection, banned pesticides, and protective legislation were the solutions for this unique symbol of freedom in America. In a very special way they also symbolize the ingenuity of Americans when we set out to solve a problem that once seemed without solution. In July 2000, they were removed from the Endangered Species List. The bald eagle had become a new symbol of freedom, a victory over the insurmountable odds of habitat loss, poisoning, and persecution.
Instructor Notes

1. If students find this to be a useful tool in diagramming a presentation, encourage them to use the worksheet to diagram their own presentation. This doesn’t work for everyone, so don’t force them to use it. It’s simply one way to approach the weaving of tangibles and intangibles during a presentation.
**Tilden’s Original Six Principles**

Freeman Tilden was the first person to formalize and record the prevailing thinking on the principles of effective interpretation. He did so in his book *Interpreting Our Heritage*, first published in 1957.

I. Any interpretation that does not somehow relate what is being displayed or described to something within the personality or experience of the visitor will be sterile.

II. Information, as such, is not Interpretation. Interpretation is revelation based upon information. But they are entirely different things. However, all interpretation includes information.

III. Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable.

IV. The chief aim of Interpretation is not instruction, but provocation.

V. Interpretation should aim to present a whole rather than a part, and must address itself to the whole man rather than any phase.

VI. Interpretation addressed to children (say, up to the age of twelve) should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. To be at its best it will require a separate program.


**Instructor Notes**

1. Discuss the principles of interpretation. Have the students work in groups of three to five, with each group creating a one-minute skit that illustrates each one of Tilden’s six principles of interpretation. Ask them to hold their skits to less than 2 minutes each and time them to be clear that you don’t want a longer example. After each skit have a very brief discussion of what it illustrated and how it revealed the meaning behind the principle. List the key word in each principle, for example: 1–Relate; 2–Reveal; 3–Art; 4–Provoke (inspire, not anger); 5–Holistic; 6–Appropriate. Point out any innovative interpretive techniques shown in the skits.
1. If time allows, review Cable and Beck’s principles and discuss the differences between these and Tilden’s. Principle number 8 and number 12 are of special interest.

Cable & Beck’s Interpretive Principles

Expanding on Tilden’s original six principles, Larry Beck and Ted Cable offer the following fifteen guiding principles for interpreting nature and culture, again listed verbatim:

1. To spark an interest, interpreters must relate the subject to the lives of the visitors.
2. The purpose of interpretation goes beyond providing information to reveal deeper meaning and truth.
3. The interpretive presentation—as a work of art—should be designed as a story that informs, entertains, and enlightens.
4. The purpose of the interpretive story is to inspire and to provoke people to broaden their horizons.
5. Interpretation should present a complete theme or thesis and address the whole person.
6. Interpretation for children, teenagers, and seniors—when these comprise uniform groups—should follow fundamentally different approaches.
7. Every place has a history. Interpreters can bring the past alive to make the present more enjoyable and the future more meaningful.
8. High technology can reveal the world in exciting new ways. However, incorporating this technology into the interpretive program must be done with foresight and care.
9. Interpreters must concern themselves with the quantity and quality (selection and accuracy) of information presented. Focused, well-researched interpretation will be more powerful than a longer discourse.
10. Before applying the arts in interpretation, the interpreter must be familiar with basic communication techniques. Quality interpretation depends on the interpreter’s knowledge and skills, which should be developed continually.
11. Interpretive writing should address what readers would like to know, with the authority of wisdom and the humility and care that comes with it.
12. The overall interpretive program must be capable of attracting support—financial, volunteer, political, administrative—whatever support is needed for the program to flourish.
13. Interpretation should instill in people the ability, and the desire, to sense the beauty in their surroundings—to provide spiritual uplift and to encourage resource preservation.
14. Interpreters can promote optimal experiences through intentional and thoughtful program and facility design.
15. Passion is the essential ingredient for powerful and effective interpretation—passion for the resource and for those people who come to be inspired by the same.

Knowing Your Audience
Instructor Notes

1. Ask students to list reasons why they might come to an interpretive program. When they finish making their lists, ask for volunteers to share what they’ve written. Use their responses and the list provided in the workbook to guide a discussion on how interpretive (noncaptive, informal) audiences differ from captive audiences (formal education).

2. Talk about the significance of the cartoon on page 16.

3. Share with your students more about John Falk’s research. Discuss five types of visitors and how people may come to our site with one motivation in mind, and leave as a different type of visitor. What do each of these visitor types need from interpreters?

---

What motivates an audience?

List the reasons someone might attend your program.

---

Kinds of Audiences

*Why Zoos and Aquariums Matter* was a study done on a National Science Foundation Grant by John H. Falk, Ph.D., Eric M. Reinhard, Cynthia L. Vernon, et al. Its findings suggested a way to describe interpretive audiences that reflects their motivations, instead of demographic and geographic descriptions. The categories they suggest are:

“Explorers” are curiosity-driven and seek to learn more about whatever they might encounter at the institution – might spend more time and get more involved – potential volunteers often come from this group

“Facilitators” are focused primarily on sharing the experience with others – parents and grandparents bringing children, locals bringing friends from out of town

“Professional/Hobbyists” feel a close tie between the institution’s content and their professional or hobbyist passions – might enjoy going “behind the scenes”

“Experience Seekers” primarily get satisfaction from just visiting this important site – often want a photo taken of the guest with the resource behind her or him

“Spiritual Rechargers” are primarily seeking a contemplative and/or restorative experience – may want to just sit or walk and enjoy without interpretive intervention

What are some specific ways you could help each of these segments connect with the resource and better enjoy their experience?

---
Maslow’s Hierarchy

In 1954, Abraham Maslow’s study of human behavior found that people could attend to their “higher selves” only if their basic and intermediate needs were attended to first. Because interpretive programs aim to evoke emotional, behavioral, and psychological responses, we can use the hierarchy of human needs to help us achieve our goal.

<table>
<thead>
<tr>
<th>Basic needs</th>
<th>What you can do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physiological</td>
<td>• Provide for health, comfort, and sanitation</td>
</tr>
<tr>
<td>Safety</td>
<td>• Have first aid available; advise guests of safety measures</td>
</tr>
<tr>
<td>Security</td>
<td>• Act consistently; avoid punishment or sarcasm</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Intermediate needs</th>
<th>What you can do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Love and belonging</td>
<td>• Use guests’ names; be glad they’re there</td>
</tr>
<tr>
<td>Esteem</td>
<td>• Publicize guest achievements</td>
</tr>
<tr>
<td>Knowledge</td>
<td>• Use practical applications of concepts and ideas</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Growth needs</th>
<th>What you can do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding</td>
<td>• Suggest self-motivated activities</td>
</tr>
<tr>
<td>Aesthetic</td>
<td>• Offer opportunities for informal observations</td>
</tr>
<tr>
<td>Self-actualization</td>
<td>• Provide resources for exploration</td>
</tr>
</tbody>
</table>

Interpreters can help people spend less time concerned over their basic needs so that there is a better chance to achieve higher-level thinking or self-actualization.

Instructor Notes

1. Have students stand up behind their chairs and hold their breath through the exercise. They can take a breath quickly as needed but must hold it the rest of the time. Turn the lights out and have them circle the room quickly over and over as you read a passage from a fairly complex book. Read a paragraph or two, then have them stop and quiz them about the information you read. Chances are good they won’t have assimilated much, allowing you to make the point that without comfort, they can’t learn.

2. Demonstrate Maslow’s hierarchy as a pyramid, and point out that if we do our jobs correctly, the pyramid reverses - people spend so little time distracted by basic needs that they’re able to devote more of themselves to self-actualization.
### Instructor Notes

1. Discuss Maslow’s Hierarchy and the implications for interpretation. Have the students complete the worksheet listing ways they can apply the theory in their presentations. Ask for volunteers to read a few things they’ve written and discuss with the group.

### Applying Maslow’s Theory

<table>
<thead>
<tr>
<th>The needs</th>
<th>The application</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Survival</strong></td>
<td>A concern for immediate existence. Air, food, body temperature, etc.</td>
</tr>
<tr>
<td><strong>Security</strong></td>
<td>Safety needs. Self-survival and group survival. Perception of danger.</td>
</tr>
<tr>
<td><strong>Belonging</strong></td>
<td>Being accepted as a member of a group. Acknowledgment.</td>
</tr>
<tr>
<td><strong>Esteem</strong></td>
<td>Being recognized as a unique person. Being special and different.</td>
</tr>
<tr>
<td><strong>Knowledge</strong></td>
<td>Having access to information. Wanting to know about the meaning of things, events, symbols.</td>
</tr>
<tr>
<td><strong>Understanding</strong></td>
<td>Knowledge of relationships. Integration of new knowledge and theory.</td>
</tr>
<tr>
<td><strong>Aesthetic</strong></td>
<td>Appreciation for the order and balance of all life. A sense of beauty and love for all.</td>
</tr>
<tr>
<td><strong>Self-Actualization</strong></td>
<td>Development of a consistent yet flexible life philosophy. Becoming the self which one truly is.</td>
</tr>
</tbody>
</table>

Instructor Notes

1. Discuss how people process information and learn through a variety of styles. Show examples of interpretive activities (attending a slide show, participating in a water safety demonstration of fitting a PFD, etc.) and ask students to identify the learning style and side of the brain that are involved.

2. Using the Maslow exercises you just did, ask how that segment addressed the different learning styles.

3. Keep this segment simple – this is not a graduate course on learning styles; we just want to make the point that people learn and process information differently so we need to try many different techniques.

4. You can illustrate the power of learning styles by using a construction exercise (Legos work well for this). Divide the class into four groups. Give each person a baggie of the same type of Legos with a finished design in mind. With the verbal group, give each person written instructions in the baggie (words only). With the visual, give them a set of visual instructions (much like the Lego sets do, no words). With the kinesthetic group, allow them to see the finished product but give no instructions – it’s okay if they take apart the model and put it back together during the process. And with the auditory group, talk them through the construction process (instructions only, no coaching). Make sure you keep the groups separated so they can’t see or hear what the other groups are doing. Set a time limit (2-3 minutes is plenty). Discuss the results.

Learning Styles

People learn differently. If you plan for a variety of learning styles in your presentation, then you increase the chance that your message will be accepted.

**Auditory**
learner must hear the information.

**Visual**
learner must see the information.

**Verbal**
learner must read the information.

**Kinesthetic**
learner must interact with the information.

Many studies have been done regarding learning styles. You may find it helpful to become familiar with some of the following theories:

**Cognitive Development Theory**

**Moral Development Theory**

**Learning Styles**

**Proster Theory**

**Flow Learning**
Instructor Notes

1. Discuss the difference between market-driven programs, and program-driven markets. Market-driven programs are designed with audience interest in mind, whereas program-driven markets respond to the programs that are being offered (but if the audience isn’t interested, they tend not to show up).

2. Discuss the ways in which audience information might be gathered or is currently gathered at your site and what are the advantages and disadvantages of those methods.

Getting to Know You

Learning about your audience helps you to create a more meaningful program. Generally, the best time to do market research is before you plan your programs, but as you gain experience, you will be able to quickly assess your audience at the beginning of a program and make adjustments accordingly (see “On-the-Spot Audience Evaluation,” page 21). For example, if you’ve planned a program for family groups, but only seniors show up when it’s time for the program to start, your chances of having a successful program will be increased if you can immediately adjust your examples and activities to things that will be appropriate for an older audience without children.

To determine who is most likely to attend your programs so that you can plan an appropriate program, try the following:

✓ Investigate attendance records and notes from past programs.
✓ Look at your site or company’s target markets or customer base.
✓ Read comments from your visitors.
✓ Identify characteristics of your potential audience:
  • Skill, knowledge, or ability levels
  • Age
  • Interests
  • Needs and desires
  • Where they come from

Of course, you can, to some extent, determine who shows up at your programs by the way you advertise the program and by the location, timing, and content of your program.
Instructor Notes

1. Have the students play the Sharp Eyes game to sharpen their observational skills. Have them stand in pairs and look carefully at their partners. Then have them turn their backs to their partner and change one thing. As each pair guesses correctly what was changed, they can sit down so you can tell when to proceed.

2. Go over the tips for on-the-spot evaluation, then ask for four to five volunteers. Give each volunteer a card or whisper some roles they can assume (visually impaired, mother with overeager child, etc). Allow a minute or so to let the volunteers get into character, then have the rest of the students evaluate this “audience” that might come to their program. Ask them to list their observations and what quick modifications they could make to accommodate their group.

On-the-Spot Audience Evaluation

Informal observation can tell you quite a bit about your audience. Try these techniques during your “free” time or immediately before your presentation, as appropriate.

1. Visually evaluate the group using body language, appearance, equipment amounts and types, reading material, and so forth.

2. Ask questions about why they are there, what they enjoy, where they’ve been, etc.

3. Pick up cues from conversations between guests and use that to understand their interests.

4. Meet and greet with name tags to get your knowledge of guests off to a good start.

5. Engage in chitchat that helps you get feedback on the programming and activities offered.

6. Take an informal poll to find out who has been there before and what they enjoyed.

7. Introduce yourself assertively but not aggressively.

8. Make a point to say hello to each guest at the first opportunity.

9. Ask questions and be aware of the response time taken, because it gives an indication of comfort levels.

10. Observe responses to other activities and interpretive opportunities.
Instructor Notes

1. If you have the ability to go outside the classroom and observe visitors on site, have the students spend about ten minutes doing some informal observation and then discuss their findings.

2. If you can’t get outside to see real visitors in action, show examples of audiences (magazine photos, slides, etc.) and ask for a quick analysis of what their appearance might indicate for interpretive programming.

Practice Audience Evaluation

What do you notice about the “audience” in front of you?

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<th>Characteristics</th>
<th>Implications for Program</th>
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### Think About Your Audience

General description of audience members (age, special interest, where they are from, what they know, and other attributes):

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<th>Number in group:</th>
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<th>Location of program:</th>
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<th>Time of program:</th>
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<tr>
<th>Program title:</th>
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**What the audience wants:**

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**What the audience needs:**

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**Best ways to make a connection with this group:**

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**What learning styles and sides of the brain will I address?**

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**Example of a Good Audience Description:**

Middle-income, retired couples 55 and older (demographic) from the local area (geographic) who like to visit parks for nature study and relaxation (psychographic).
Knowing Your Resource
Know Your Material

No one can be expected to be an expert on every subject. But when you decide or are told you will present a program, you should research the topic thoroughly. Research helps you ensure accuracy, establish credibility, and achieve your objectives.

Getting started
- Use a filing system or computer folders to collect articles, notes, studies, photos, and other reference materials.
- Ask colleagues if they have files related to your topic.
- Keep a “Bright Ideas” page near your desk or on your computer.

Where to look for information
- Primary sources (you gather firsthand information)
  - Keep a journal of direct observations
  - Conduct research studies
  - Conduct interviews
  - Become a photographer or videographer
  - Create and maintain checklists
  - Build a resource library of your own work
- Secondary sources (you review previously gathered information)
  - Use library resources such as encyclopedias
  - Visit the Internet
  - Research field guides
  - Study maps
  - Examine official records and archives
  - Question tourism bureaus
  - Visit similar sites

Instructor Notes
1. Discuss the need for good information in a program. Ask the students for suggestions of how to find information. Follow up with a discussion of the list of research methods in the workbook. This is a good time to discuss the merits of internet research and stress that several sources should be considered before blindly accepting what’s offered at any one site.

When I heard the learn’d astronomer,
When the proofs, the figures, were ranged in columns before me,
When I was shown the charts and diagrams, to add, divide and measure them,
When I sitting heard the astronomer where he lectured with much applause in the lecture room,
How soon unaccountable I became tired and sick,
Till rising and gliding out I wander’d off by myself,
In the mystical moist night-air, and from time to time,
Look’d up in perfect silence at the stars.

—Walt Whitman
“When I Heard the Learn’d Astronomer”
1. Explain that not all information is factual and can lead to biased presentations. Ask when bias is likely to creep into programs and what the effects can be. Ask whether the effects of bias are positive or negative. The point is to have the students come to the realization that bias is difficult to eliminate entirely, but may result in “interpreganda” rather than “interpretation” and that offering multiple perspectives is the better approach. Have the students complete the worksheet, then share their answers with the class (hint: none of the sources listed are without some bias).

2. Explain the differences between interpreganda, interpretainment, and good interpretation. Interpretanda ignores multiple points of view, oversimplifies issues, does not allow the audience to maintain a personal perspective and usually involves one way communication, while interpretainment offers stereotypes, arranges facts around a punch line, doesn’t give the audience much credit for being truly interested in the resource and doesn’t care what the audience thinks.

3. Take a topic and find facts from five different internet sources. Post the facts and have students try to figure out which fact came from which source. Reveal the true sources and discuss the implications (they will almost certainly conflict with each other).

Present Balanced Information

Beware of bias!
Good research materials should be objective, presenting a balanced view of the topic. If you deliver biased information, your credibility will suffer.

Which of the following are likely to be balanced, and which are likely to be biased? Circle the appropriate answer.

A. Newspaper articles
B. Trade magazines
C. Research journals
D. Personal recollections
E. Weather data
F. Visitor interview results
G. Visitor observation data
H. Encyclopedia articles
I. TV news reports
J. Internet sites

Plot the letter of each item on this continuum where you think it best fits.

Think about the sources you use and list three here:

Are they balanced or biased?

Biased | Balanced

Instructor Notes

1. Explain that not all information is factual and can lead to biased presentations. Ask when bias is likely to creep into programs and what the effects can be. Ask whether the effects of bias are positive or negative. The point is to have the students come to the realization that bias is difficult to eliminate entirely, but may result in “interpreganda” rather than “interpretation” and that offering multiple perspectives is the better approach. Have the students complete the worksheet, then share their answers with the class (hint: none of the sources listed are without some bias).

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3. Take a topic and find facts from five different internet sources. Post the facts and have students try to figure out which fact came from which source. Reveal the true sources and discuss the implications (they will almost certainly conflict with each other).
After the listening you become accountable for the sacred knowledge that has been shared. Shared knowledge equals power. Energy. Strength. Story is an affirmation of our ties to one another.

—Terry Tempest Williams
“Pieces of White Shell”

Give Credit

If you use somebody else’s ideas, words, or pictures in any form of presentation, you should acknowledge the original source if known. You can do this by:

- Adding footnotes to written material
- Attributing the source as you speak (“As interpreter Robert Fudge once said, ‘Asking an interpreter a question is like taking a drink from a fire hose.’”)
- Indicating the source after a direct quote
- Showing a list of source material following your program (the credits)

Failure to give credit where credit is due may damage your own credibility and violate copyright law.

Instructor Notes

1. Have the discussion about giving credit to sources. Be wary of promising that interpreters fall under the educational or fair use provisions of copyright law. Copyright law is very complex and the better thing to teach is that credit should always be given and permission received to use copyrighted materials.
Design Your Research Plan

A good research plan will help you get started and learn about your topic. Once you have a reasonable amount of information at your fingertips, you can begin to plan your program and determine a theme.

As you examine your research material, make notes on 3”x 5” index cards or in a computer database with one thought, image, or supporting fact per card. Be sure to include the meanings behind the facts. This approach will help when you begin to outline your presentation, allowing you to create “storyboards” more easily.

Your topic: _______________________________________________

Five possible sources for images, ideas, or supporting facts:

1. _____________________________________________________

2. _____________________________________________________

3. _____________________________________________________

4. _____________________________________________________

5. _____________________________________________________

Once you have the above information listed, add phone numbers or addresses for contacting the sources, specify dates by which you need the information, and check “done” when you’ve rounded up the information.

<table>
<thead>
<tr>
<th>Source</th>
<th>Contact</th>
<th>To Be Done By</th>
<th>Done</th>
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<td>5</td>
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<tr>
<td>Others</td>
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</tbody>
</table>
As you gather your resource material, remember:

**People love to hear...**

- Good stories
- Unusual facts (catfish have over 100,000 taste buds all over the surface of their body)
- Inspirational thoughts and quotes
- Gee-whiz information in terms they understand (over 4,000,000 bathtubs full of water go over the falls every hour)
- Things that evoke emotional or physiological responses (scary things, beautiful things, sad things, happy things)
- What’s important to them

**But don’t really care much about...**

- Ordinary scientific data (this waterfall averages 3,694,524 cubic feet per second in flow)
- Doom and gloom predictions or rehashings of catastrophes (the ozone layer will be totally depleted, and the Earth will burn up in x number of years)
- The same thing they’ve heard or read at every other interpretive site or talk they’ve ever been to (65 million years ago, this area was covered by a vast inland sea)

Instructor Notes

1. Ask for examples from the students or provide examples from your experience of what people love to hear. List the examples, pick one or two and then see if you can find a reference source to support those statements.
Words to Live By

Do not try to satisfy your vanity by teaching a great many things. Awaken people's curiosity. It is enough to open minds; do not overload them. Put there just a spark. If there is some good inflammable stuff, it will catch fire.

—Anatole France, as quoted in *The Earth Speaks*

**Instructor Notes**

1. Finish the discussion of gathering factual resource material by using the quote from Anatole France. Remind the students that saying “I don't know” is an appropriate response as long as it's followed by “I'll find out.”

2. Talk about how to avoid “interpretorture” – bombarding the visitor with too much information.
Program Development
Instructor Notes

1. Discuss the National Park Service Interpretive Equation concept. Explain that the object is to balance content material (the facts) with the techniques being used to relate to the interests of the audience from the knowledge you have of them. Too much technique causes guests to focus more on what are doing than the meanings being revealed. Too much content is boring and you wonder what is the point?

2. Write the equation (in words) on sheets of paper, one word to each sheet of paper. Have each student pick a sheet of paper at random, then try to form themselves into a sentence (the equation). This works better if you do it before the discussion of the equation and is a nice lead-in. If you have more than thirteen to fifteen students, let the remaining students be responsible for placing the word-holders in order.

3. Another way to illustrate this point is to create an actual balance beam with bags of items that represent techniques and knowledge of audience/resource.

NPS Interpretive Equation

The National Park Service describes the opportunity to deliver interpretation in the following manner:

\[(Kr + Ka) \times AT = IO\]

Knowledge of the Resource (Kr) +
Knowledge of the Audience (Ka) \(\times\)
Appropriate Techniques (AT) =
Interpretive Opportunities (IO)

It's important to remember that the equation can quickly become unbalanced, like a teeter-totter, if too much emphasis is placed on either of the (Kr + Ka) or AT components. Either way, your interpretive opportunity may not stand up to the strain, so strive for balance.
Social Marketing

The connections made through interpretive experiences can lead people to take action.

Instructor Notes
1. Use the discussion from the NPS equation related to interpretive opportunity to springboard a discussion of the interpretive opportunity. People may come to us at any step along the way (or be at one level related to one topic and another level related to another topic). The opportunity we have is to try to move them towards action (stewardship) with any given program.

—Freeman Tilden
Interpreting Our Heritage, 1957

Through interpretation, understanding; through understanding, appreciation; through appreciation, protection.

Certified Interpretive Guide Training Workbook 35
Instructor Notes

1. This model is at the heart of everything we teach in all certification classes. It's a variation of the model in Bill Lewis’ book, but the variation is important to comment on. This model indicates that the interpretive opportunity is derived from audience interest, management objectives, and the resource itself — not the interpreter. Good interpretation doesn’t mean ”whatever the interpreter is interested in” — good interpretation must go beyond the individual interpreter and incorporate all three of these other elements. Again, tie it to the definition of interpretation — audience interest, mission-based, meanings of the resource. The interpretive opportunity is the communication process that forges these three together.
The Interpretive Approach

Interpretation serves a **Purpose**.
The program can and should support the mission and goals of the organization.

Interpretation is **Organized**.
Formal interpretation has an introduction, a body, and a conclusion.

Interpretation is **Enjoyable**.
People participate in interpretive programs because they want to, not because they have to, so they expect to enjoy themselves.

Interpretation is **Thematic**.
People tend to remember themes but forget strings of facts.

Interpretation is ** Relevant**.
People respond better to things that relate directly to their knowledge or experience as individuals or as human beings.

**You make the difference.**
Your passion and individual style can make the difference in how audiences respond.

In his book *Environmental Interpretation*, Sam Ham identifies **enjoyable, relevant, organized, and thematic** as key components in interpretive communication. NAI believes that **purpose** is critical to success. CIT Wren Smith’s POETRY approach brings it all together and reminds us that **you** make the difference.

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**Instructor Notes**

1. Give a brief overview of the interpretive approach (you will spend more time on each individual component later). The approach includes four components from Sam Ham’s book used with his permission, but for which you need to credit the author (Enjoyable, Relevant, Organized, Thematic). Added to those four components by NAI is a fifth component of equal importance - that interpretation has a purpose. The sixth component that makes the acronym work is **You**, added by a Wren Smith, CIT. Ask the students to relate the components to the principles of interpretation previously discussed. Give them a few minutes to look back at page 13 and 14, then ask if anyone can identify the principles that relate to each of the four components.

2. Although the POETRY acronym makes this approach easy to remember, it does not mean that you must teach the pieces in this order. Feel free to change the order as long as you still use the acronym to give an overview. Let students know if you intend to change the order of presentation so that they don’t perceive the change as disorganization on your part.
Goals and objectives justify the reason(s) for providing interpretation. If you can’t state goals and objectives for your program, there’s probably no reason to be doing it.

An interpretive objective describes what you expect the visitor to do as a result of your activity. Stating your objective allows you to plan a program with measurable effectiveness and ensure that your program supports the mission and goals of your site or company.

Goal(s)
The goal(s) should reflect the reason you’re doing the program. A goal may be stated in general terms but should allow you to measure the appropriateness of the program. For example:

The goal of this program is to create awareness of and support for the funding of whale research.

Objective(s)
Your objective or objectives support the goal and describe what you want the visitor to do. Objectives should be written in specific, measurable terms so that they can be used as an evaluation tool as well as a planning tool. Objectives should describe the method of presentation, how visitors will participate, and the type and extent of outcome. For example:

After participating in the “Whales on Wheels” program:

1. At least 75 percent of visitors will sign up for a whale-watching outing.
2. At least 25 percent of visitors will make a donation of $5 or more to the research program.

So, basically, we’ve said that we want them to care about our message and we want them to do something about it. Writing clear objectives helps to ensure that the message elements you’ve selected make sense for your theme.
Achieving Your Organization’s Mission

If you don’t know your agency’s mission, take the time to learn it. The mission should guide the content of your programs.

(adapted from an exercise by Denise Dowling)

Instructor Notes

1. Depending on the number of students in the class, divide into small groups with one group assigned to each of the blocks on page 39. Have each group develop a site-specific list of examples that might be associated with each block (i.e. what staff, budget, facilities might be used; who are some of the key customers or stakeholders) and then discuss the examples.
Instructor Notes

1. Explain logic models. If you need additional information regarding logic models to better understand them, do a google search that will yield a variety of articles that may be helpful. Do not try to have each student write an entire output-outcome-impact sequence for a single program. One or two objectives at the outcome level are fine for CIG level work.

2. Use the analogy of a football game to help people grasp the logic model concept. If the desired impact is to reach the Super Bowl, what has to happen to achieve that (win x number of games)? Winning games is the outcome desired, so what do players have to do to achieve that (score)? Scores are the output, and there are action steps to achieve those scores (downs). It sometimes helps to work from impact to output rather than output to impact in creating a logic model. Remind your students that they are not responsible for achieving the impact (reaching the Super Bowl) – just one game along the way. When put together with other “games” (programs, exhibits, etc.), the combination of interpretive efforts (outputs) will work towards achieving the impact.

3. Help your students understand the difference between cognitive and behavioral objectives. Although Environmental Education programs deal primarily with cognition, interpretive programs (the focus of this course) usually deal more with behavioral objectives. This goes back to the audience discussion of captive vs. non-captive audiences and what motivates people to attend interpretive programs.

Using Logic Models

Think about how your program fits within the bigger scope of all the interpretive efforts at your site. As one piece of a larger puzzle, your individual efforts in each program can contribute towards your agency mission and make a real difference in developing stewardship of heritage resources.

Logic models help define “if-then” statements that can help you write measurable objectives that are reasonable and meaningful. Most individual program-level objectives would be considered “outcomes” within a logic model, although some may be “impacts” as well.

Outputs: what we do (for example, number of contacts made)

Outcomes: what visitor will do as a result of contact (for example, the objectives on page 38 are outcomes—if we make contact during the program, they will be able to identify the importance of whale research or make a donation). CIG programs should achieve this level on the logic model in directly observable ways.

Impacts: how the agency or resource will benefit from successful outcomes (if people donate money, we can hire additional research staff; if people support research, whale populations may stabilize or improve as a result of changes being made).
Examples of Site-based Measurable Objectives

These are examples of measurable objectives that might be developed in specific situations.

**NATIONAL PARK RESOURCES**

Bear Aware at Yosemite National Park

The “Bear Aware” program at Yosemite was created to deal with a management challenge resulting from problem bears who threaten humans and their property in the park. Eight to 9 bears were euthanized annually before the program began and “0” after implementation of the program. Property damage has been reduced considerably from the $2,000,000 annually before the program. The following examples are not specifically in use at Yosemite but exemplify how objectives might be used with that program.

**Goal:**

Protect the natural and cultural resources of the park for future generations.

**Objectives:**

**Outputs:**

- 100% of persons registering at a Yosemite lodge or campground will view the looping video of a bear breaking into a car.
- Distribute 50,000 park newspapers with “Bear Aware” articles.

**Outcomes:**

- 100% of those registering for camping or staying in a lodge will sign a pledge to not feed bears or leave food in their automobiles.
- Use of bear-proof food storage boxes in campgrounds will increase by 25% by end of the year.

**Impacts:**

- No bears will be put down each year for being problem bears.

**TOURISM RESOURCES**

Turtle Camp near Cabo San Lucas, Mexico

The bays around Cabo San Lucas, Mexico, provide sandy beaches for nesting sea turtles as well as attractive recreational areas for tourists. Plastic bags threaten the lives of sea turtles by blowing into the water where they resemble jellies eaten by turtles. When a turtle ingests a bag, it kills the turtle by stopping food absorption in the stomach. Ecotour guides focus on keeping the beaches clean as a sea turtle conservation move with special emphasis on not using plastic bags.

**Goal:**

Maintain sustainable populations of sea animals in estuarine environments of Cabo San Lucas to protect natural heritage and maintain tourism opportunities.

**Objectives:**

**Outputs:**

- Deliver 40 presentations about the danger of plastic bags to sea turtles.
- Distribute 100 flyers to local businesses asking them to switch from plastic to paper bags with a “save the sea turtles” message printed on them.

**Outcomes:**

- 50% of Turtle Camp tourists who attend guided tours will stay after the tour to participate in a beach cleanup.
- 25% of those who complete a Turtle Camp tour will donate money to the local research program within 30 days.
- 50% of local businesses contacted will switch to recycled paper bags with a “save the sea turtles” message printed on them by end of the year.

**Impacts:**

- Sea turtle deaths in the Turtle Camp area from plastic bags will decline 50% by end of the year.

Instructor Notes

1. The examples on pages 41-43 illustrate a variety of venues. After discussion the most appropriate example for your class location, attempt to create a logic model for the site. CIG presentations for the site might reasonably focus on the outcome objectives in that model, though this is not required (your CIG students may not be doing a site-specific presentation).

2. Have students work in small groups to write two behavioral objectives and then share their work with the class in discussion. Make sure they have addressed how the objective can be measured and whether the measurement tool is reasonable (long-term measures may not be very reasonable for a 10-minute presentation, but short term measures such as having people sign up for something, purchase something, or donate something are easily measured). Objectives cannot be something like “People will understand that alligators are cool.” Stress the idea that people are likely to do something if they understand that alligators are cool – what is it they’re likely to do? That’s the measurable objective.
NON-PROFIT RAPTOR CENTER RESOURCES
Raptor Center of Pueblo, Colorado The Raptor Center of Pueblo was created to rehabilitate birds of prey and educate children about ecology. Keeping non-releasable birds for educational purposes is a vital part of the program. Many raptors are brought in with injuries from West Nile Virus, trains, electrical wires, and other circumstances which cannot be controlled but the shooting of raptors and removal of young from nests can be lessened through effective interpretive/e.e. programming.

Goal: Encourage understanding and appreciation for the role of raptors in natural ecosystems.

Objectives:

Outputs:
• Conduct school programs on raptor ecology using non-releasable raptors with 10,000 school children annually.
• Provide rehabilitative services for 200 birds of prey annually.

Outcomes:
• Increase donations through bird adoptions by $10,000 annually.
• 20% of children will bring their families back on weekends with the free “Behind the Scenes” coupon.

Impacts:
• Gunshot birds brought to the Raptor Center will decrease by 10% annually.

COUNTY GOVERNMENTAL RESOURCES
Boulder County Historical Museum The county planned and built an agricultural museum to attempt to preserve an appreciation of the unique early agricultural history of the area for area residents and tourists.

Goal: Encourage an understanding of the unique role that agriculture played in development of Boulder County in Colorado.

Objectives:

Outputs:
• Develop 5,000 square feet of exhibits that tell the stories of agricultural development in the county that led to the modern economy of the region.
• Host 25,000 day visits in the first year to tourists, local people, and school children.

Outcomes:
• The sale of books from the local agricultural history list in the museum bookstore will exceed $10,000 by end of the year.
• At least 50 people will participate in recording oral histories of their family farm.

Impacts:
• Ten local farm families will agree to conservation easements on their property to perpetuate local agricultural landscapes in the county over the next five years.
PRIVATE RAFTING COMPANY

River Adventure Float Trips on the local river is a private, for-profit company – This private raft company is run by a nature center that also sponsors an annual Clean up the Rivers Day on the Arkansas River. The raft company attempts to demonstrate its commitment to keeping the river clean for wildlife and recreational users by setting a good example while taking people on raft trips.

**Goal:** Protect wildlife habitat and the quality of river recreation experiences.

**Objectives:**

**Outputs:**
- Deliver “keep the river clean” message to at least 5,000 rafters annually.
- Provide paper litter bags in each raft.

**Outcomes:**
- 100% of rafters will place their trash in the bag provided.
- 25% of rafters will pick up a piece of litter they find during beach stops and place it in the raft trash bag.

**Impacts:**
- Raft guides will pick up less than five pieces of litter per beach stop on their own due to individual effort by others.
- The annual “Clean up the Rivers Day” will find a decline of 10% in volume of litter along the river corridor over the previous year.

NON-PROFIT BOTANIC GARDEN

The Foothills Botanic Garden is located in an urban area in the western United States. They have both family and commercial members who support their mission. They focus entirely on exhibitions of native plants and landscapes. Water conservation is a major interest of the entire community because of low rainfall and the use of impounded waters for irrigation of yards, businesses and agricultural crops.

**Goal:** Encourage people to use native plants in landscaping to reduce the demand for the use of potable water to irrigate residential and commercial landscaping.

**Objectives:**

**Outputs:**
- Sell native plants in the botanic garden plant shop with information about how they conserve water.
- Design and deliver 25 native plants workshops annually for members and interested citizens.
- Plan and design media for families and businesses on how to use native landscaping as a way of reducing water use and save money.

**Outcomes:**
- More than 500 citizens attend xeriscape workshops annually.
- Major water managers in the community (water department, sewage department, parks department, ditch companies) cooperate annually on reducing per capita consumption of water.
- Annually 10 business owners or managers in the community will sign a Memorandum of Understanding with the botanic garden to convert their landscaping to native plants to reduce irrigation water consumption.

**Impacts:**
- Native landscaped yards and businesses in the community increase by 10% in five years.
- Per capita use of water by homeowners in the community will decrease over the next ten years.
Instructor Notes

1. This worksheet can be used if it is helpful, but if you teach the “P” before “T”, you’ll need to skip the theme line or come back to it later. It is helpful, however, to point out that themes and objectives should have a relationship. For example, if a zoo sells elephant paintings in their gift shop to support elephant conservation activities, an appropriate theme can work with a behavioral objective as follows: Let’s say the theme was “Elephants can do many things with their trunks.” Granted, it’s a complete sentence, but many of the other traits are missing - most significantly, the “so what” message. This theme lends itself to a cognitive objective (visitors will be able to list three things elephants do with their trunks) because it is essentially a fact and not a message. But it really doesn’t matter whether visitors know this information. In fact, what we really want is for visitors to understand that these paintings are important to elephant survival because the purchase price goes to support conservation activities. So now we have both an objective and a theme emerging - the theme evolves into “Elephants carry the art of survival in their trunks.” Subthemes include some of the things elephants do with their trunks (eat, drink, etc.), but also that these paintings are done for a reason. The objective becomes to get a specified percentage people to purchase paintings in the gift shop (an outcome), which leads to an impact of being able to support conservation activities.

<table>
<thead>
<tr>
<th>Theme:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal:</td>
<td></td>
</tr>
<tr>
<td>Objective:</td>
<td></td>
</tr>
<tr>
<td>What is the measurable factor?</td>
<td></td>
</tr>
<tr>
<td>Why is this important?</td>
<td></td>
</tr>
<tr>
<td>How will you test the measure?</td>
<td></td>
</tr>
</tbody>
</table>
Interpretation Is Organized

Organizing your presentation increases the chances that your audience will retain some of what you present. An organized talk is easier to comprehend, allowing the interpretive audience to enjoy themselves rather than work at comprehending it.

A well-organized presentation includes a stated objective and:

1. **Introduction**—lays the foundation and lets audience know what to expect.
2. **Body**—contains the main points you want to make in support of the theme (five or fewer).
3. **Conclusion**—provides closure and reinforces the theme.

Instructor Notes

1. Use a simple analogy to illustrate the idea of organizing a talk. Drawing a snowman is one technique (head = introduction, hat = Maslow, eyes = make eye contact, smile = welcome and introduce yourself and agency, nose = state your theme; middle snowball = body, buttons = subthemes; third snowball = conclusion – don’t forget to put shoes on the snowman to represent that you’re giving your theme legs to last beyond the program.)
2. Another technique is to use a string of pearls (you can make a really big one out of Styrofoam balls and yarn) where large pearls represent subthemes, small ones between the large ones represent individual facts or stories, and the string represents the theme to hold it all together.
Introductions

Structuring provides guidance for the visitor. Your program introduction establishes the climate you expect to maintain throughout the program. It's your opportunity to let the visitors know you will take care of their needs as well as provide an enlightening and enjoyable experience. Things to include:

- Who you are
- What is going to happen
- Where you're going (if applicable)
- Where you'll end up (if applicable)
- How long it's going to take
- What will be required of the visitors
- Theme statement

These items allow visitors to decide immediately if the program will meet their need for safety and security. When these needs are met, the audience will be more receptive to the message.

Use the space below to write an introduction to your program. Incorporate the recommended items, but be creative by…

- Using an attention-getting statement related to your theme
- Sharing a personal experience
- Letting them know you welcome questions
- Showing your personality

Introduction:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Instructor Notes

1. Discuss what makes a good introduction. Have students use the worksheet to jot down the introduction for their presentation. Make sure they understand that this is not required on the outline form – it's just a chance for them to pull together their thoughts. They should not attempt to memorize their introduction word for word.
Body

Organize your subthemes into the body of your presentation, and include appropriate transition statements or activities.

Transition from introduction:
____________________________________
____________________________________

Subtheme 1:
____________________________________
____________________________________

Transition:
____________________________________
____________________________________

Subtheme 2:
____________________________________
____________________________________

Transition:
____________________________________
____________________________________

Subtheme 3:
____________________________________
____________________________________

Transition to conclusion
____________________________________
____________________________________

The body of your presentation is where you present your subthemes, leading from your introductory statement, through whatever presentation techniques you choose, and leading into your conclusion.

Further structuring occurs as you transition from one thought or activity to another during the body of your presentation.

It is common to have three or fewer sub-themes in a 10-minute presentation.

Instructor Notes

1. Discuss transitions. Demonstrate several short scenes, some illustrating good transition technique and some without any transitions. Encourage students to use the worksheet to think about the transitions they will use during their presentation. Emphasize that just because there are three subtheme spaces on the worksheet, that does not mean they are locked into using three subthemes.
Conclusions

The conclusion may be the most important part of your presentation. Because it comes last, it will leave the biggest impression in the minds and hearts of your visitors. The conclusion should incorporate the following items:

- Summary of subthemes and theme
- Suggestions for continuing activities related to the theme
- Provocation of further thought or action
- Opportunity to seek further information from you
- Promotion of a good feeling about your site or company

Use the space below to write a concluding statement:

Conclusion:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Instructor Notes

1. Go over the presentation outline form instructions. It’s a good idea to leave this piece until you’ve covered all of the other pieces of the POETRY model. It’s in the O for organized because it serves as an organization tool for students to prepare for their presentation, but that doesn’t mean you have to teach it in this order.

2. If you reserve it for the last part of POETRY that you teach, the students will have covered all the material and be familiar with all the pieces. If they’ve used the worksheets in the book, filling out the outline form should be relatively simple as they go back through their notes and tweak their work.

Instructions for Presentation Outline

To complete the requirements of this course and your qualification for Certified Interpretive Guide status, you must prepare an outline for a ten-minute thematic presentation of a topic of your choice. Your outline must be turned in on the form provided by your instructor.

Outlines include the following elements:

1. Goal
2. Objective(s)
3. Audience
4. Title
5. Theme
6. Introduction
7. Body (subthemes)
8. Conclusion
9. Resources needed

Use the worksheet on the next page to develop your presentation outline. A clean copy of your outline will be turned in and evaluated along with your ten-minute presentation. Evaluation comments will be returned to you.

Following the workshop, continue to use the presentation outline format above for new programs you will develop.
**Instructor Notes**

1. Program Title is not graded.
2. Theme is graded (up to 10 points off if it doesn’t meet criteria).
3. Audience is graded (up to 10 points off if not specific)
4. Goal is graded (up to 5 points off if inappropriate)
5. Objective(s) is graded (up to 15 points off if not specific, measurable, and reasonable, behavioral). One objective is enough.
6. Resources are not graded.
7. Introduction – must reflect bullets on page 46. Bullets are fine – no need to write it all out. (up to 10 points off if bullets are not covered appropriately)
8. Body – must be written as themes in complete sentences; usually two to three are plenty. (up to 10 points off if they don’t meet theme criteria)
9. Conclusion – must reflect bullets on page 48. (up to 10 points off if bullets are not covered appropriately).
10. This is the ONLY outline form that will be accepted. You cannot allow students to type their outline separately. Use only this form, included in the student certification packet.
11. A written numerical grade MUST be assigned by the instructor and displayed on the outline form. Without this grade, your student will not pass. A passing grade is 80 or above.
12. You should be coaching this process to get your students to some grade in the 90s. Students who do well on their outline generally do well on their presentation. A failing outline is the failure of the instructor, not the student, because you have the chance to coach them to do better. By the same token, you must grade fairly and appropriately on these forms – giving high marks for substandard work will not be accepted.
13. Plan to make enough copies of the outline form for students to go through several iterations to get their outline in top form before submitting their final outline in their certification packet.
Instructor Notes

1. Illustrate some ways to make interpretation enjoyable. Bring an orange to the class. Give a one-minute presentation of simple facts about the orange, holding it up where people can see, but not have contact with it. Then ask for a volunteer to hold the orange. Ask them to feel it and describe the feeling. Cut into it and watch orange oil spray from the peel, then let the audience sniff the aroma. Have your volunteer separate a slice and eat it. Ask the class which is more enjoyable - the factual presentation from a distance or interacting with the orange in a multisensory fashion? This also works well with peanuts or pistachios, but be sure to ask about nut allergies if you use them.

2. Discuss the ways of making presentations more enjoyable listed on page 51. Ask if anyone can share an example of a program that was enjoyable and what made it so.

Interpretation Is Enjoyable

Ways to make it more enjoyable:

- Smile
- Use active verbs (play, involve, creep)
- Involve all five senses
- Address multiple learning styles
- Show cause and effect
- Link science to human history
- Use visual metaphors
- Use a “vehicle” (music, art, poetry, demonstration)
- Use an overriding analogy
- Create a contrived situation
- Use personification
- Focus on individuals

What are some specific things you could incorporate into your presentation that would make it more enjoyable?
Every interpretive presentation should communicate a theme. The theme is the primary message you want to get across.

- A theme is different than a topic. A topic can be considered a broad, general category such as:
  - Whales
  - Wildlife habitats
  - Historic houses

A theme narrows the focus of a topic and answers the question, “So what?” about the general topic. Themes are usually stated as complete sentences and serve as an advance organizer.

- Different whales use different methods to eat.
- We can help keep wildlife habitats healthy.
- Architecture styles influence lifestyles.

By stating your theme, you know where you’re headed with your program, so the theme acts like a road map for you to plan the visitor’s journey through your presentation. When you’ve reached your destination (the end of the presentation), your visitor should be able to tell you where you ended up (your theme) and how you got there (a few bits of supporting information).

**What research supports our thematic approach?**


Miller, George. (1956.) The Magical Number, Plus or Minus Two: Some Limits on Our Capacity for Processing Information. *The Psychological Review*.


**Instructor Notes**

1. Explain the difference between themes and topics, and why themes are important. Can a question be a theme? Possibly – if it meets the other criteria.
2. Some students may suggest that a theme does not need to be a complete sentence or could be several sentences. When you are teaching advanced interpreters, you may want to explore that discussion, but when you are teaching beginners, encourage them to get the basics first before heading into nuance.

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**Traits of a Theme**

- complete sentence (or complete idea) that expresses a message or point of view
- answers “so what”
- connects tangibles to intangibles
- specific and interesting
Recognizing Themes and Topics

Fill in “TH” for theme or “TO” for topic:

- Bald eagles are the symbol of our nation.
- Endangered Hawaiian plants
- I wish I was a Steller’s sea lion.
- Elephant seals’ mating rituals and other erotic stuff
- George Washington could have been king of America but chose not to be.
- The stories of the stars talk through the night skies.
- Inupiats, people of the North
- Athabascan mysteries and the creation of the earth
- Ecosystems have plants and animals.
- The water is green for a reason.
- Modern agriculture is based on the good work of worms.
- Trains, planes, and automobiles
- Transportation brings the world to your doorstep.
- This old house
- Historic houses reflect the life and times of their owners.
- The Old West wasn’t so wild after all.
- Famous cowboys and their horses
- Desert people of the past
- Killer bees are coming to get us.
- The sky is blue.

Circle the three strongest themes.

Instructor Notes
1. Have the students complete the worksheet, then check their answers by going down the list and asking whether the items are themes or topics.
Instructor Notes

1. This worksheet is often useful for beginners if they have not had much experience writing theme statements. If they have written theme statements (good ones) before, they may not need to work through this process.

Theme Development

Here's a simple process described by Sam Ham that may be helpful in developing a theme:

1. Select a general topic and use it to complete the following sentence:

   "Generally, my presentation is about ____________________________ ."

2. Now, express your theme by completing the following sentence:

   "After hearing my presentation, I want my audience to understand that ____________________________ ."

Some people may find it easier to talk their way through these two steps or bypass the two steps altogether if they "think" in themes already. Regardless of how you get there, make sure your themes meet the criteria on page 52. If writing a theme is challenging, do it by asking yourself the questions above.

Supporting the Theme

Once you determine your theme, you can decide what subthemes will support that theme (remember to keep it to five or less). This approach can be expressed as follows:

\[ T = t_1 + t_2 + \ldots + t_n = T \]

where \( T = \) theme, \( t = \) subtheme, and \( n \) is less than or equal to 5.

By stating the theme in the introduction, supporting that theme with subthemes in the body, and restating the theme in the conclusion, you will make a strong impression on your audience and help them remember the point of the program.

Theme

____________________________________________________________________

Subthemes (sometimes called message elements)

1. 
2. 
3. 
4. 
5. 

A 10-minute presentation often has only one theme or two or three sub-themes.
Combining Two Approaches to Presentation Planning

**Theme:** Bald eagles are symbols of our nation in more than one way.

**Subthemes:**
1. Bald eagles are specially adapted for survival.
2. Their specialized diet created a problem that almost led to extinction.
3. Action by government agencies and individuals made the difference for the survival of the species.

**Restated Theme:** Bald eagles symbolize freedom and our conservation successes in the United States.

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**Intangibles**

1. Memory Awe
2. Home Survival
3. Recovery Freedom
   - Thin Eggs Dead Babies
   - DDT Pesticides

**Tangibles**

1. Fishing Bird
2. Great Nest
3. 5,000 Pairs
   - Protection

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*Format adapted from David Larsen, National Park Service Module 101.*

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**Instructor Notes**

1. This page shows the overlap between planning tools, using the Tangible/Intangible chart and the idea of subthemes to show how the two tools accomplish the same thing. They help to develop the nuance and sequence of the presentation. They may be used separately or together but there is a relationship and this graphic is simply intended to show that relationship, using the example from the eagle talk given earlier (or whatever talk you give). If you create your own presentation as an illustration, create a handout similar to this page that shows the relationship of the two planning methods.
Interpretation Is Relevant

Personalize it

• Use first names

• Reference the self (think of the last time you…)

• Use “labeling” (people who enjoy nature…)

Make it meaningful

• Relate to universal concepts (love, freedom, hunger)

• Connect with something within the audience's frame of reference

• Bridge the unfamiliar to the familiar with metaphors, similes, analogies, comparisons

Instructor Notes

1. Discuss an overview of ways to make interpretation relevant.
Referencing the Self

Complete the following sentences in a way that will help the audience connect with the artifact.

Think of the last time you


Have you ever


How many of you have


What do you have in your home that


Instructor Notes

1. Set an object on the table in front of the group. Have the class work in small groups of three to five people. Each group will take a different self-referencing lead (think of the last time you . . . , have you ever . . . , how many of you have . . . , what do you have in your home . . . ). Let them come up with five or six phrases to finish the statement that helps connect the audience to the artifact.
**Instructor Notes**

1. Give the students a few minutes to jot down some ideas for the worksheet on the left-hand side of page 59, then go over what they’ve written with the whole group.

2. Have the students use the right-hand side of page 59 to work on their individual presentations, trying to think of ways that may help their presentation be more relevant to their audience. They do not have to include all types of self-referencing in their presentation, but this exercise allows them to think through what they’re doing and then later choose what seems to work best.

---

**How Does That Relate?**

Fill in the blanks with a word, phrase, or idea that will help your visitors understand the following:

- ___________________________ Significance of birthplace of U.S. president
- ___________________________ Insulating power of whale blubber
- ___________________________ Volcanic eruptions
- ___________________________ Social structure of wolf packs
- ___________________________ How glaciers move
- ___________________________ Number of people killed in Civil War battle
- ___________________________ Whale baleen plates
- ___________________________ Likelihood of shark attacks
- ___________________________ Daily chores on a pioneer farm
- ___________________________ Life in a tide pool
- ___________________________ Size of an indigenous tribe encampment site
- ___________________________ Age of tombstones in a graveyard

What are some specific things you could incorporate into your presentation to make your material more relevant to the audience?

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Certified Interpretive Guide Training Workbook
**Interpretation Begins with You**

Very often, you are the one who initiates the interpretive communication process. You are the flexible piece of the equation. What you do to keep abreast of changes and new ideas in the field can make a big difference in how visitors perceive and respond to heritage resources.

Think about the things you can do to keep growing as an interpreter. This checklist might provide a start, but you should add to it as you find new opportunities for personal and professional development.

- Maintain membership in NAI
- Participate in a regional, sectional, national, or international NAI workshop
- Write an article for NAI Now or a region/section newsletter
- Volunteer at an NAI function
- Serve on or chair a volunteer committee at my place of business or NAI
- Attend a college course on interpretation
- Visit the NAI web site (www.interpnet.com)
- Visit other interpretive association web sites from around the world
- Become a Certified Interpretive Trainer
- Complete other NAI credentials (CIM, CIP, CIT, CHI, CIH)
- Keep a log of interpretive activities
- Make a bucket list
- Take part in a voluntourism project
- Learn one new life skill each year
- Visit other interpretive sites and watch visitor behavior
- Take time to enjoy natural and cultural heritage experiences in your own way to rekindle your personal “passion”
- Expand your perspective by subscribing to something you disagree with
- Form an informal network of local interpreters
- Share your ideas on the CIG Facebook page
- Collect photos of your favorite things and ideas on Pinterest
- Get a friend to visit other sites with you
- Keep a journal
- Be a mentor to a Certified Interpretive Guide
- Develop a skills program to share
- Other:

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Instructor Notes

1. Go over some opportunities for continuing professional development. This is a good opportunity to bring in a guest speaker for half an hour to answer questions about what got them into the field and what keeps them in.
2. Make and show videotaped interviews of NAI members addressing how they keep their skills sharp.
3. As homework the night before, ask each student to come up with something that they do to stay energized and on task (related to their interpretive work).
Instructor Notes

1. This is your chance to get really creative. Remember that the point of the creativity section is to help each student understand that everyone is creative – everyone can come up with ways to make their presentations more enjoyable. However, everyone has different ways of being creative, so working collaboratively helps everyone get better.

2. Use the exercises in the book or create your own. Some people like to play a board game such as Cranium that engages all learning styles.

3. Have the students pair up. Have one person in each pair leave the room and find an object small enough to put in their hand or pocket, so their partner cannot see it when they return. Without exposing the object, have the first person describe it to the second person so that the second person can draw it. Rules are simple: no questions, no giving away what it does or what it’s used for, just physical attributes such as color, texture, shape, length, etc. When everyone believes that they have drawn the object, let the drawer see the object and compare to their drawing. Ask what was hard about this exercise for the drawers (most will say that they couldn’t ask questions or that they fixated on something in their head and couldn’t get past their own mental image). Make the point that creativity can be stifled by our own brain getting in the way and that sometimes a simple shift in perspective or asking a colleague questions can open things up.

Get Creative

1. Connect all the dots with four straight lines without raising your pen from the paper.

   • • •
   • • •
   • • •

2. List ten different ways you can use a toothpick as something other than a toothpick.

   1. 
   2. 
   3. 
   4. 
   5. 
   6. 
   7. 
   8. 
   9. 
   10. 

When Getting Creative...

- There are no wrong answers, just different perspectives.
- It is okay to borrow or “piggyback” off of other’s ideas.
- Use your own experiences and background to create relevance.
- There is always more than one right answer.
- Don’t be afraid to test or “bounce” your thoughts and ideas off others. Have fun with your ideas.
- Ask the “What if?” questions.
- Do your own creative activities using metaphors, similes and analogy. Consider it a right brain building exercise program.

—Roger Riolo, CIT

“Every child is an artist. The problem is how to remain an artist after growing up.”

—Pablo Picasso

“Thinking is the hardest work of all, and that’s why so few of us do it.”

—Henry Ford
What Are Creative People Like?

1. Creative people are extremely alert perceptually. They use all their senses all the time. Describe something you noticed this morning and what sense it alerted.

2. Creative people are builders of their ideas. They like to experiment, solve problems, and push the boundaries of their thinking. Imagine yourself stranded on a deserted island, and describe something you might create to help yourself enjoy your stay.

3. Creative people like to explore new ideas. They dream, imagine, pretend, and invent new ways of saying things. Write a new verb (or phrase) that describes the action of a vocalizing toad.

4. Creative people are confident in themselves. They are independent, outwardly expressive, and unafraid to show emotion. List the two best qualities about yourself.

5. Creative people like to investigate the nature of things. They question existing data and search for deeper meanings. Imagine yourself sitting on a moonlit beach and staring at the stars. What is the question that pops into your head?

6. Creative people are sensitive to aesthetic stimuli. They appreciate beauty, have a feeling for harmony and rhythm, and enjoy singing, dancing, writing, and art. Think about something beautiful, write it down, and then write the name of a piece or style of music that should accompany your vision.

Adapted from U.S. Army Corps of Engineers Interpretive Services Training, 1985 edition.

Instructor Notes
1. To use this worksheet, have the students get comfortable (out of their chairs if possible). Read each sentence and allow the students to silently write their answers. Once you’ve gone through all six questions, go back to the top of the page and work your way down, asking for volunteers to share what they’ve written.
Instructor Notes

1. This next section is best prefaced with a misguided tour or something similar. An outrageously bad interpretive presentation put on by the instructor provides some comic relief and allows the instructor to illustrate how not to do things. Immediately follow the bad presentation with a better one that illustrates a thematic approach and good questioning techniques. This will set up the next several segments on delivery techniques. Neither presentation should be more than about five or ten minutes in length. This can be done by a guest presenter, but usually works better if it’s the instructor.

Program Delivery
Questioning Strategies

People enjoy being engaged in the program. One way to encourage their participation is to ask questions. A questioning sequence can be used to “pull” the audience through the program, allowing them to interpret their own observations.

Open questions: This type of question has no wrong answers. Use these questions early in the program to allow everyone the immediate opportunity to participate regardless of their experience or knowledge level.

What do you see as you look at the hillside?

Focusing or data-recall questions: Visitor recites a specific number, list, or statement. Use these questions to focus attention on specific data as a central point of discussion.

What are some things that are helping the log decay?

Interpretive or data-processing questions: Visitor uses data to show relationships or analyze.

How does the wood strength or texture of these two trees compare?

Capstone or application questions: Visitor summarizes, predicts, theorizes, or applies principles to a new way of thinking.

How would this area be different if the forest had not burned?

Write an example of each type of question you could use in your presentation:

Open:

Focusing:

Interpretive:

Capstone:

Instructor Notes

1. Discuss the different types of questions and how they can be used to develop a program. Use the presentation you did as an example of the various questions.

2. To help students understand the differences between the types of question, post the names of the different types of questions around the room. Give each student a question written on a large piece of paper (large enough to be seen by each student) and have them place the paper (Post-it Pad paper works well for this) under the type of question they think it is. Once they’ve all been posted, review the questions and discuss whether they’ve been placed correctly.
Response Strategies

The way you respond to questions you've asked sets the tone for your interpretive program. If you are welcoming and receptive to visitor comments, more discussion is generated and the likelihood of success is enhanced.

Questions asked by visitors are also a valuable source of feedback. If you analyze those questions, they can tell you if your message is being communicated effectively or needs further clarification.

Responses can be classified in three ways. The most appropriate response will be dictated by the individual situation and the personal style of the interpreter.

**Accepting response** is always the ideal:

- Passive acceptance—nodding your head, saying okay without judgment or evaluation
- Active acceptance—expressing your understanding of what the visitor is saying ("So you're saying that...")
- Emphatic acceptance—expressing your feelings as you show that you understand the visitor's response ("I can see you're upset by the litter. So am I.")

**Clarifying response** clears up what the visitor is trying to say:

- Could you explain what you mean by "expansion?"

**Facilitating data** supply the needed information in any one of a number of ways:

- Provide an opportunity for discovery by themselves
- Serve as a data source
- Use other audience members
- Refer to other sources
- Make materials available for the visitor to determine the answer
- "Let's look in this field guide together to identify that flower."

Instructor Notes

1. Prepare three or four scenarios for role-playing (i.e. someone gives a completely off the wall question to an interpreter in the middle of a program). Have the students role-play through the scenarios and discuss the benefits or drawbacks of potential responses.
Instructor Notes
1. Have the students fill out the worksheet, using situations they’ve actually encountered. If they haven’t encountered any of these situations as an interpreter, perhaps they’ve seen the situation occur as a visitor. If not, have them imagine a situation. Discuss how the situations were handled.

Ask and Answer

1. You’re leading a group, and one visitor seems determined to derail your presentation with persistent questions that are off the subject. Provide a possible response to a completely inappropriate question.

   Question:
   
   Response:
   
   Follow-up:

2. List three possible responses to someone who disagrees with your answer to another visitor’s question.

   Question:
   
   Response:
   
   Follow-up:

   Question:
   
   Response:
   
   Follow-up:

   Question:
   
   Response:
   
   Follow-up:

3. Write two questions you could ask to get visitors involved at the beginning of your program. What are some potential responses, and how could you follow up on those responses?

   Question:
   
   Response:
   
   Follow-up:

   Question:
   
   Response:
   
   Follow-up:
Program Tips

Interpreters are famous for finding ways to get their point across, and the variety is endless, bounded only by your creativity, budget, and sometimes your organizational philosophy.

The most commonly used aids include slides, demonstrations, and guided activities, but you might also want to use music, poetry, puppets, or other approaches to engage your audience and express your theme. One of the best places to learn new approaches is at the NAI National Workshop or your regional NAI workshop (see www.interpnet.com for information about workshop dates and locations).

For the more traditional aids, the following suggestions will help you maximize their effectiveness.

**Slides and PowerPoint™ presentations**

1. Use only the best photos—if you have to apologize for its quality, don’t use it.

2. Start and end with a black slide or inspirational photo or quote.

3. Avoid looking at the screen during your presentation—you should already know what’s up there, so talk to your audience, not the slide.

4. Avoid describing the slide ("This is a deer."). Your audience can see what’s on the screen.

5. Figure one slide for about every eight seconds. Actual time on screen should depend on the content of the slide and the point you’re making, but generally slides should be on no fewer than six seconds or more than ten.

6. Create a PowerPoint outline to help you plan and practice your presentation, but don’t use notes during the show.

Instructor Notes

1. For the next few pages, demonstrate one or more types of gimmicks and gadgets (activities, demonstrations, slide shows, artistry, etc.) that can be used in a presentation. Discuss a variety of ideas, but focus on the one or two that seem most appropriate for your group. For example, if your group only gives guided walks, focus on that. If your group never uses slides, there is no need to spend time on how to do a slide presentation.

2. One idea for a demonstration is to give everyone a rubber band. Have them put the rubber band across the back of their hand, looping one end around their little finger, then putting in one twist, and looping the other end around their thumb. Now ask them to remove it without using their other hand or any other part of their body. The difficulty they encounter illustrates what an animal goes through when tangled in fishing line.
Demonstrations
Demonstrating something to your audience can often be an effective way of making a point and provides an opportunity for audience interaction. For example, instead of telling your audience how to put on a life preserver, you can demonstrate it by having an audience member try one on and then adjusting the fit. Key considerations for effective demonstrations:

1. Avoid using small objects in large groups to ensure that all audience members can see what you’re demonstrating.
2. Invite the audience to become part of the demonstration whenever possible, but be sure their safety is considered (don’t, for example, ask a novice diver to demonstrate the use of breathing apparatus under water).
3. Test all the parts involved in your demonstration prior to the presentation to make sure they work and that you know how to use them.
4. Be prepared for the audience member who tries but can’t repeat the demonstration. Make sure the person enjoys the failed effort just as much as if he or she had performed brilliantly.

Program activities
Activities embedded in your program appeal to all age groups, but if poorly planned, they can disrupt the flow of your program rather than making your point. For the best success:

1. Test the activity with colleagues before trying it with an audience.
2. Seek out a variety of sources of appropriate activities—check web sites of related organizations, visit your library for activity ideas, or adapt scout or school activities to illustrate your theme. Outline activities on index cards, and keep a file handy so you can look them up later.
3. Make sure your activity supports and illustrates your theme. Avoid using activities for the sake of being active.
4. Be sure you have all supplies on hand. Plan for extras in case your audience is larger than anticipated.
5. Give clear instructions. Be prepared to help those who don’t understand without ignoring the rest of your audience.
Guided tours
Sometimes it's appropriate to take your program from place to place, such as during a historic house tour or along a nature trail. You can structure the guided tour much like a regular program, but be sure that you:

1. Start on time and return to the starting point when promised.

2. Take charge. You are the leader of the group, and the visitors depend on you to get them from start to finish safely.

3. Even if you've met everyone informally while the group was forming prior to the tour, take the time to greet them as a group, and structure the experience.

4. If you have people who may not be physically up to the challenge of your tour, try to take them aside before you start and explain the physical demands of the tour. Make them feel welcome, but help them make the right choice for their comfort.

5. Establish a “staging area” where people can gather prior to the tour. This is your chance to meet the group and establish rapport before beginning your presentation. Your presence will indicate the location of the staging area, so be sure to arrive at least ten to fifteen minutes prior to your scheduled program.

6. After your introductory statements (usually delivered at the staging area), move out briskly for the first stop, and then set a moderate pace to the remaining stops. If possible, make your first stop within sight of your starting point so that latecomers can join you.

7. Stay ahead of your group between stops.

8. Make sure everyone is focused on you before you begin speaking at every stop.

9. Be conversational—but be heard.

10. Repeat questions so all can hear.

11. Share discoveries and take advantage of teachable moments.

12. Have a definite dismissal point. Avoid abrupt endings, but make it clear that you're done.

13. Thank everyone and offer to stay after to answer any questions. Invite them to join you again.
If speaking before a group causes even the butterflies in your stomach to take flight, try these methods for becoming more comfortable:

1. Know your material.
2. Practice your presentation.
3. Use involvement techniques.
4. Learn participants' names and use them.
5. Establish your credibility early.
6. Use eye contact to establish rapport.
7. Take a course in public speaking.
8. Exhibit your advance preparation.
10. Check facilities and AV equipment in advance.
11. Obtain information about the group in advance.
12. Convince yourself to relax.
13. Introduce yourself to the group in advance.
14. Manage your appearance.
15. Rest up so that you are physically and psychologically alert.
16. Develop and use your own style.
17. Use your own words—don't read or memorize.
18. Put yourself in your audience's shoes.
19. Assume that the audience is on your side.
20. Accept some fear as being a good thing.
Instructor Notes

1. Have the students stand facing the wall of the classroom, toes against the wall. Spread them out as far as you can so they can each hear their own voice reflected back to them. Have them speak directly to the wall in a loud, then a soft voice. They should hear a significant difference that will point out the need to project and vary the voice during presentations.

2. Have the students try some tongue-twisters to practice enunciation. Point out that speaking slowly helps avoid tongue-twisting.

3. Provide a copy of fractured fairy tales and ask one of the students to read a story to demonstrate how registers of voice can be used to create interest and reveal different characters within a story.

Your Voice

A good speaking voice is:
- Expressive
- Natural
- Pleasant
- Vital

To help develop your most effective speaking voice, work on these items:

**Breathing**
Use short sentences to allow natural breathing space.

**Pitch**
Vary the tone to avoid monotones or annoying patterns.

**Vocal Climax**
Plan a dramatic crescendo or whisper for emphasis.

**Pronunciation**
If you don’t know it, look it up and practice.

**Enunciation**
Keep your words clear so everyone can hear.

**Rate**
Vary the rate according to the material.

**Quality**
Strive for mellow tones—avoid harsh, nasal, or quavery voice.

**Pause**
Use dramatic pauses for emphasis.

**Volume and Force**
Avoid shouting at your audience or using explosive force.
Nonverbal Communication

Body language can speak much louder than your voice. Practice your presentation in front of a mirror or on videotape to help develop a body language as pleasant as your voice. Watch for the following:

**Attitude**
Avoid deep sighs, frowns, clenched teeth, and furrowed brows. They all say that you’d rather be somewhere else. Smile—it lets your audience know you enjoy your job.

**Posture**
Too stiff, and you’ll seem uncomfortable. Too slumped, and you’ll seem bored. Better to stand up straight, but relaxed, to give your audience the impression that you have the confidence to lead them.

**Distracting hand or body movements**
Keep hands in a natural position. Avoid clasping your hands, wringing your fingers, and scratching your head or chin (or other body parts). Don’t stand rooted to one spot, but avoid pacing or weaving (shifting weight from one foot to the other).

**Using the body to illustrate a point**
Act naturally and your body will automatically help you illustrate points in your presentation without seeming contrived.

**Dress and hair**
Be clean and neat in your overall appearance. Keep hair out of your face so your audience can see your expressions. If you wear a uniform, wear it properly. If you don’t wear a uniform, be sure your clothes are appropriate to the occasion and clean.

**Jewelry**
Keep jewelry and watches simple so they do not detract from your presentation.

**Tattoos and body piercings**
Unless these are part of a uniform, they do not convey a professional image and may make audience members uncomfortable. Cover tattoos with clothing, and leave the body piercing rings and studs at home.

Instructor Notes

1. Ask for two volunteers. One will be a “pose-able mannequin” and the other will be the one who poses the mannequin. Have the rest of the class suggest different attitudes that can be expressed through body language. Let the poser put the mannequin in the appropriate position to demonstrate the attitude. The point is to get the students to recognize body language and the importance of what it conveys. This exercise makes more of an impression than having the instructor demonstrate a variety of attitudes (and is a lot more fun to watch).
Self-Critique Your Program

Adapted from materials provided by
Kelly Farrell & Jay Miller, Arkansas State Parks

Purposeful
How does your topic relate to the mission or resources of your park?
(What is the call to action? (What will you prompt the audience members to
think/do as a result of experiencing your interpretive program?)

Organized
Are your subthemes complete sentences (complete thoughts?)
Do your subthemes flow in a logical way?

What will you say to transition between subthemes?
• To link intro and subtheme 1:
• To link subtheme 1 and 2:
• To link subtheme 2 and 3:
• To link subtheme 3 and conclusion:

Enjoyable, Experiential, Engaging
Is your program “e”? (enjoyable/experiential/engaging) How?
1.
2.
3.

What props/visual aids will you use?
1.
2.
3.

Are there things we did in CIG class that you can use in your program? (e.g. the
tangible/intangible activity, games, brainstorming, discussion, mind-mapping, etc.)

What big / unusual / scientific words in your program need explaining?

Instructor Notes
1. Encourage students to self-critique their own program using the workbook page. If you videotape presentations (not required for CIG students), remind them to watch their videotape later and objectively review their performance with this self-critique form in mind.
Thematic
Are you going to make BOTH types of connections?

intellectual (tangible / brain):

emotional (intangible / heart):

Relevant
What open-ended questions will you ask, to help guests connect their lives to your topic?

1. 
2. 
3. 

What are you doing for each of these learning styles?
Auditory:
Visual:
Verbal (reading):
Kinesthetic:

How much of your program involves you talking to/at the audience?

It is more like a lecture or more like a conversation? Explain.

What tools for talking do you plan to use?

1. 
2. 
3. 

You
What special thing will you do that is uniquely yours—your own interpretive style—that will really make this program shine?
Instructor Notes
1. Review the guidelines and ask for any others that the students think should be included.

Ten Guidelines for Handling Visitors

1. Do not frown or scowl at visitors.
2. Ask pleasantly if you can be of service to visitors.
3. Make yourself a storehouse of information for visitors, and cheerfully share your knowledge with them.
4. Do not bluff or attempt to deceive when asked a question for which you do not know the answer. It is not a sin to say, “I don’t know,” but never respond that way a second time to the same question.
5. Answer the same question once again with a smile even though you’re exhausted.
6. Be neat and clean. It shows respect for your visitors.
7. Be as prompt as possible when greeting and serving visitors.
8. Happy children mean happy parents. Do what you can to keep them all happy, and your workplace will benefit.
9. Encourage visitors to stay and enjoy themselves, here and at other sites on their journey, so that the entire system benefits.
10. Send visitors on their way with smiles—on your face and theirs.
Much of this workshop focuses on “formal” interpretation—those opportunities for preplanned programs and activities that engage your visitors and lead to greater understanding.

But “informal” interpretation, that which occurs spontaneously at unexpected times and places, provides additional opportunities to reach your audience. Many of the same techniques can be used in informal settings (questioning, demonstrations, and so forth), but sometimes visual aids move quickly (wildlife sightings), so you need to think fast to capitalize on these opportunities.

The following page shows an example of an interpretive logbook that allows you to chronicle your informal interpretive experiences. The logbook format serves as a tool for self-improvement and a record of visitor contacts. It can also be used as “evidence of performance” should you decide to continue your interpretive career and attempt to achieve status as a Certified Heritage Interpreter.

To learn more about informal interpretation, consider taking NAI’s Certified Interpretive Host course.
Instructor Notes
1. Ask the students to complete the worksheet describing a situation they have encountered (even if it occurred off-site). Have a few of the students volunteer to describe briefly what they’ve written and discuss the results.

Opportunity Logbook
Adapted from National Park Service Module 102.

Name: ___________________ Location __________________________

Special circumstances (time constraints), if any:
_________________________________________________________

How was the interaction initiated?
_________________________________________________________

What were the audience's needs and how did you determine them?
_________________________________________________________

How did you respond?
_________________________________________________________

How did the guest respond?
_________________________________________________________

Describe how you enhanced the guest's experience:
_________________________________________________________

_________________________________________________________

_________________________________________________________
Experience Economy and Visitor Experience Design Model

Planning for Complete Experiences
Pine & Gilmore’s Experience Economy Theory suggests that people are looking for complete experiences. The Experience Economy is characterized by:

- Theming the experience
- Harmonizing impressions with positive cues
- Eliminating negative cues
- Mixing in memorabilia
- Engaging all five senses

Visitor Experience Model

Each program or interpretive contact engages visitors in each of these stages. Think about how you might enhance the visitor experience in each stage.

Adapted from Lisa Brochu, Interpretive Planning: The 5-M Model for Successful Planning Projects

Instructor Notes
1. Help students place their presentation in perspective in terms of creating complete visitor experiences at their site. Very often, interpreters forget that they’re part of a much larger picture. Emphasize that even a single program has a decision point and all the other phases other Visitor Experience Design Model.
For your continuing education, we recommend the following materials. Many are available through NAI’s Association Store at www.naimembers.com/store.


