



National Association for Interpretation

2008 ANNUAL REPORT

Annual Report



NATIONAL ASSOCIATION FOR
INTERPRETATION

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NAI Mission

Inspiring leadership and excellence to advance heritage interpretation as a profession.

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.

2008 Board of Directors

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Donna Richardson, VP for Programs
Nancy Stimson, Secretary
Bruce Stebbins, Treasurer

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Amy Ford
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Lisa Brochu *associate director*
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Deborah Tewell *sales & events manager*
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Carrie Koch *certification clerk*
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Trisha Koppert *membership assistant*
Lou Anderson *administrative assistant*

On the cover: Participants in the Interpreters Road Show explore the Oregon coast during the 2008 NAI National Workshop in Portland. Photo by Jay Miller.

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Participants in the 2008 NAI International Conference in Sokcho, South Korea, during an offsite session at Seoraksan National Park.

The President's Perspective



Jim Covell

Everyone in this country has been touched by the severe economic downturn that began in 2008. That is certainly true for the membership of NAI and for interpreters everywhere. This has been one of the most challenging operating environments for all organizations, particularly non-profits.

I'm pleased to report that NAI is not only surviving, but continues to thrive and grow. Our membership levels are growing. Our international participation is increasing. We are reaching an expanding audience through social networking media. We're maintaining a very conservative approach to finances to keep NAI in the black.

This level of success isn't an accident. You have a professional staff and Board of Directors that work diligently on your behalf, supported by dozens of Region and Section officers and a host of member volunteers at all levels. We are all committed to the success of interpretation and the organization that represents our profession.

While our financial statements show our net assets, the true wealth of this organization is in the passion and commitment of its membership—that makes NAI more valuable than at any time in our past. Thank you for investing in the future of interpretation by supporting NAI.

In 2008, the National Association for Interpretation (NAI) grew to an all-time high in membership of 5,331 in October. The National Workshop in Portland, Oregon, was well attended with 1,132 at the event. The International Conference in Sokcho, Korea, was attended by 160 people from 30 countries.

At the NAI national office, we reduced staff to eight, despite the growing demand of a larger membership. We could see the sharp downturn in the economy coming and began making adjustments.

Careful financial management is critical in economic declines. Brock and Company, CPAs PC was hired as an external auditor and their report gives a picture of the changes in overall financial circumstances. The Statement of Cash Flow shows Net Cash in 2008 for operating activities of (\$2,060). The Change in Net Assets reported was (\$135,924), a considerable decline for the year. NAI sustained an unrealized loss in investment funds of (\$57,690). The decline in the stock market reduced the portfolio of \$135,138 to \$77,203 by year-end. Like many other organizations, we did not sell off stocks during this dramatic change. The record decline was not anticipated.

Also, auditors analyzed how NAI treats life memberships and determined that under current standards in Generally Accepted Accounting Principles (GAAP) and an accrual reporting system, NAI should be amortizing Life Member revenue over a period of 20 years for each membership. This resulted in a prior period adjustment that decreased net assets by \$78,328 at January 1, 2007, and those funds are reported as deferred income.

The combination of the prior period adjustment and unrealized decline in stock portfolios along with a small operating loss led to the dramatic change in Net Assets to (\$436,697).

Total Temporarily Restricted Funds amounted to \$206,740 on December 31, 2008. Permanently Restricted Funds had grown to \$583,394 and those are all invested in the property at 230 Cherry Street, Fort Collins, Colorado, by Board of Directors mandate. The \$200,000 façade grant of 2004 from Fort Collins Downtown Development Authority becomes unrestricted in 2011, offsetting some of the current deficit in unrestricted funds.

Total Revenues, Gains, and Other Support for NAI grew to \$1,753,097 at end of 2008 with the building at 230 Cherry Street being the main asset. Though no formal appraisal has been done recently, a recent valuation by Wells Fargo Bank places the estimated current market value of the building at \$1,181,997, which is \$81,153 greater than the \$1,100,844 reported on the balance sheet. NAI had a mortgage balance of \$467,197 at year-end. NAI continues to support that debt by renting two office suites in the building to Rocky Mountain Bird Observatory and National Parks Conservation Association.

Gross revenues for 2008 were \$1,753,097. Expenses for the year amounted to \$1,898,777. Net Assets at year-end were \$217,513. Programmatic activities accounted for 90% of staff time and expenditures, 9% for administrative services and 1% for fundraising.

From the Executive Director



Tim Merriman

NAI began 2008 with a staff of 10, and Tara Tanner left the staff early in the year as Membership Assistant. We chose to not rehire due to the emerging national economic problems. In the fall we reduced staff to eight positions, eliminating the Sales Director position. Our smaller staff is dedicated to maintaining a high level of service quality despite less help through employing new technologies that make NAI more efficient. I am very pleased to share management responsibilities with Associate Director Lisa Brochu, who manages programs for NAI. We report independently to the Board of Directors.

Partnerships continue to be important to NAI's success in providing professional development services. We also appreciate the thousands of hours by more than 1,000 volunteers each year in the delivery of services to regional and sectional members, at national and international workshops and in support of certification as reviewers. They are too numerous to name here but their contributions are invaluable to the association and the profession. NAI's 123 Commercial Members and 292 Institutional Members also support the organization and profession through ads, collaborative investments, and other contributions that make all member services and the base price of membership more affordable.

NAI's Board of Directors includes 15 members representing regions, sections, and the members at large. Their dedication and contribution of time and talent continue to be important to our success and growth. They approved an update to the NAI Long Range Plans in 2008 that not only set some new directions for NAI, but also identified the challenges for the profession.

As the nation moved into an economic recession in 2008, NAI reduced staff, carefully improved services, and worked to build stronger partnerships through the Federal Interagency Council on Interpretation, NAI Korea, NAI China, and participation in professional networks throughout the United States.

Professional development has never been more important to the profession than it is during difficult times. Our organizational mission is "inspiring leadership and excellence to advance heritage interpretation as a profession." NAI's vision is to be the voice of the profession. The incredible work of our staff in producing member services, certification training, and high-quality publications remains vital in achieving our mission and vision.

NAI's national office develops and delivers programs, products, and services to members, while at the same time creating opportunities to expand understanding of the interpretive profession among the general public through outreach activities in pursuit of the organization's mission and vision. The year 2008 provided many opportunities to increase the visibility of the organization and once again increase the quantity and quality of membership services.

Highlights of 2008 related to programs, products, and services of NAI included:

- 13 professional certification workshops offered by national office staff
- Record numbers of training category classes (Certified Interpretive Guide and Host) offered by Certified Interpretive Trainers
- Third annual NAI International Conference held in Sokcho, Republic of Korea
- First Certified Interpretive Trainer recognized for certifying over 250 individuals
- Successful National Workshop held in Portland, Oregon, with over 1,100 participants
- Certification and membership databases merged for greater efficiency
- Creation of a new International Interpretation section
- Initiation of a partnership for on-line coursework with Eppley Institute and National Park Service
- Creation and quarterly meetings of an Advisory Council with the purpose of providing creative thinking related to improving lines of business
- Approval of a Program Audit Committee
- Publication of four "Standards and Practices" documents that detail best practices in the field
- Initiation of a project intended to document a "Road Map to a Career in Interpretation"
- Certified Interpretive Host and Planners courses taught in United Kingdom
- Fort Collins, Colorado, and NAI secured as the host of the Civic Tourism III conference to be held in August, 2010
- Published *Interpretation by Design* and second edition of *Personal Interpretation* through InterpPress
- Created partnership products with Your True Nature.

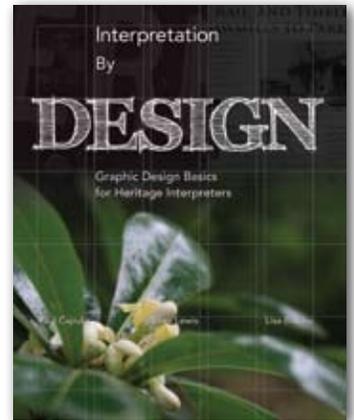
From the Associate Director



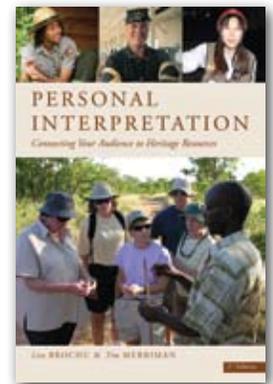
Lisa Brochu

In accordance with NAI's mission statement, NAI's publishing imprint, InterpPress, publishes books that improve the profession of interpretation over the long term. InterpPress published two titles in 2008.

Interpretation By Design: Graphic Design Basics for Heritage Interpreters by Paul Caputo, Shea Lewis, and Lisa Brochu is written for interpreters who have little or no training in graphic design but find themselves responsible for creating or overseeing the production of nonpersonal media. This book focuses on using basic principles of both graphic design and interpretation in nonpersonal media. *Interpretation By Design* addresses how to make decisions about type, color, and composition, as well as why an interpretive approach may be more effective for communicating with your audience.



InterpPress also published a second edition of *Personal Interpretation* by Lisa Brochu and Tim Merriman (first published in 2002). This book employs the most current ideas in the interpretive profession. It also shares some of the rich traditions from interpretation's past masters, drawing on Freeman Tilden's principles and Enos Mills' thoughtful ideas on nature guiding. It will connect you with the more in-depth resources developed by authors such as Sam Ham, Bill Lewis, Douglas Knudson, Ted Cable, Larry Beck, and Joseph Cornell. This resource shares the approaches tested and proven by the National Park Service and many other organizations along with the research concepts that back up their approaches.



Other titles available through InterpPress are *Applied Interpretation* by Doug Knapp (2007), *Interpretive Writing* by Alan Leftridge (2006), *The History of Heritage Interpretation in the United States* by Tim Merriman and Lisa Brochu (2006), *Management of Interpretive Sites* by Tim Merriman and Lisa Brochu (2005), *The Nature Center Book* by Brent Evans and Carolyn Chipman Evans (2004), and *Interpretive Planning* by Lisa Brochu (2003).

NAI's other publications are printed under the InterpPress imprint. *Legacy* magazine, published bimonthly, offers a forum for professionals in the field to exchange ideas and information. Articles, columns, and commentaries deal with practical issues relevant to frontline interpreters, planners, and managers. *The Journal of Interpretation Research*, published twice annually under the editorship of Carolyn Ward, communicates original empirical research dealing with heritage interpretation and provides a forum for scholarly discourse about issues facing the profession of interpretation. NAI's monthly e-mail newsletter, *NAI Now*, keeps members up-to-date with current information from members and the national office, including news items from NAI's national and international events, certification program, publications, Legacy Trust Fund, and more. *The Interpretive Sourcebook* CD-ROM collects information presented in more than 100 concurrent sessions at each NAI National Workshop.

Membership



The year 2008 brought a record high of 5,331 members in the month of October. This passed our previous high of 5,151 set in May 2007. We averaged around 5,000 members throughout the year. Membership brought in \$323,744. Subscription rates were down at around 175 subscriptions (nonmembers who received *Legacy* and/or *The Journal of Interpretation Research*).

Sales in the association store, which sells NAI logo items, books, and other publications, came in at \$69,414. Income from the association store rose from the previous year, partially due to a well-attended National Workshop in Portland.

Throughout the year we were constantly working on updating the membership side of the new association database. Midyear saw the addition of the online membership directory. We are looking forward to the introduction of a more dynamic, user-friendly member area next year.

NAI found a home on social networking sites in 2008. A strong presence on Facebook, MySpace, and LinkedIn will give our members a new access point for all things NAI.

As always, we are working to keep membership rates affordable and “green.” There are some big changes coming in 2009.

Pictured: NAI's Certified Interpretive Guide page on Facebook is one of several of NAI's new social media outlets in 2008.

Certification



The numbers in the chart below indicate those who have actually certified in either professional or training categories (the attempted column does not necessarily represent failures, but also reflects those who have not yet completed their credential requirements). However, we know that almost double the number of those who have certified in the training categories have taken the Certified Interpretive Guide or Host training courses but have not elected to be certified. Certification remains voluntary, but the emphasis on improved, standardized training is a positive statement about the growth of the profession world-wide.

In 2008, we began using an automated test scoring system to maximize the efficiency of office staff in grading the mandatory literature review that each certifying individual must complete. The certification and membership databases were merged to create greater efficiency in managing data and tracking the details of the program.

	2003	2004	2005	2006	2007	2008	Applied
CIT	133	175	209	287	369	429	760
CIM	9	15	20	25	29	35	120
CIP	11	21	28	55	93	121	524
CHI	26	37	47	61	83	91	262
CIG	1344	2289	2954	4045	5079	6236	7234
CIH	56	180	294	450 (97)	523	624 (116)	634 (150)
Total	1579	2717	3552	4923	6176	6951	9534

Pictured: Arkansas State Parks has been a major supporter of NAI's Certified Interpretive Guide program.

Partnerships are invaluable in leveraging the human and financial resources of organizations to accomplish more together than we can do alone. NAI had a variety of important partners in 2008. We wish to recognize their contributions and thank them for being open to continued work with NAI in the future. They are:

International Memoranda of Understanding

Beijing Normal University – NAI China, Dr. Wang Min, Dongying Wei
Suncheon National University – NAI Korea, Dr. Kye joong Cho

International Conference in Sokcho, Korea

NAI Korea
Korea Forest Service
Korea Tourism Organization
Hanwha Resorts
Suncheon National University
KC Publications
City of Sokcho
City of Seoul

Local Partners

Eppley Institute
National Park Service
National Parks Conservation Association
Rocky Mountain Bird Observatory
Rocky Mountain Raptor Program
Your True Nature

The annual Media Awards Ceremony took place on November 13 in Portland, Oregon in conjunction with the NAI National Workshop. Thirty-three judges reviewed 87 entries in 11 categories. The Interpretive Media Section worked with staff to coordinate the competition, judge the entries, and plan the awards ceremony. Entertainment for the awards ceremony was a partnership between NAI's Interpretive Media and the Cultural Interpretation and Living History Sections.



Tom Davies accepts the first-place award for Acadia National Park's Virtual Tour in the NAI Media Awards Web/Multimedia category from NAI President Jim Covell.

NAI's Heritage Library was the recipient of many donations from individuals in 2008. Newsletters and files from former officers of Western Interpreters Association and the Association of Interpretive Naturalists filled in archival gaps, while book donations expanded the library. A student worker processed publications, input data, and completed the long-awaited accessible database.

Partnerships

Media Awards Competition

NAI Heritage Library

NAI National Workshop



The National Workshop attracted 1,157 participants to Portland, Oregon, November 10–15, 2008. Keynote presentations from Dan Shilling, who spoke to us about Civic Tourism, and Bobbie Conner, who addressed ways our diverse cultures bring us together, set the tone for the workshop.

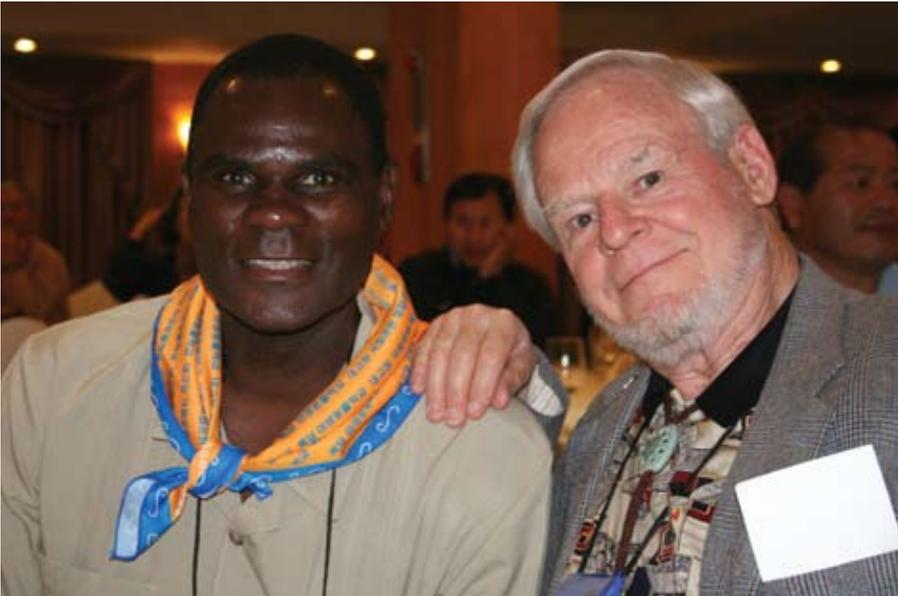
Over 100 concurrent sessions covered an array of topics in 11 tracks. One day of off-site sessions sent participants across Oregon to learn about culture, history, ecosystems, wildlife, and interpretive facilities. Pre-workshop sessions gave participants in-depth looks at a variety of topics and the Interpretive Management Institute addressed “Branding: the New Buzzword.” Special evening events took participants to five different places to see Portland after dark: the World Forestry Center, a cruise on the Willamette River, the Portland Zoo, Kell’s Irish Pub, and an introduction to zydeco music and dancing. A newly implemented BookSmart table and the VarroBook Scavenger Hunt kept participants engaged in the exhibit hall. Keeping it “green” in Portland was the way of the workshop, our greenest yet. Awards ceremonies, receptions, and networking combined with the events to make this a very memorable, high-energy workshop.

Sponsors and Partners of the 2008 NAI National Workshop

World Forestry Center	Oregon Zoo
Oregon State Parks	VarroBook
PBS	National Park Service
American Park Network	KC Publications
The Big Muddy Workshop	BelKor Logworks
California State Parks	Alechemy of Design
Bureau of Land Management	Cascade Interpretive Consulting
Signs of the Times	EPS Productions
U.S. Fish & Wildlife Service	Pink Jeep Tours
U.S. Forest Service	Washington State Parks
Aramark Giacometti Partners Ltd.	World Discovery Safaris
Provision Graphics	Your True Nature
Artcraft Display Graphics	

Pictured: Participants gather in the Oregon Convention Center in Portland for a welcome to NAI 2008.

International Activities



Over 160 individuals from 30 countries attended NAI's third annual International Conference held in Sokcho, Republic of Korea, in May 2008. This unique event continues to draw interest from around the globe as it promotes an international exchange of ideas among interpretive professionals at all levels. A fourth conference was planned for Athens, Greece, to be held in May 2009. In preparation for the 2008 International Conference, an office intern from Suncheon National University in Korea lived in Fort Collins, Colorado, for three months and assisted staff with translation and cultural competence issues.

A new International Interpretation section was created in 2008 to provide an organizational home for the growing number of international members and domestic members interested in international work and travel. In addition to the International Conference, NAI held an Interpretive Planning workshop in Brecon-Beacons National Park, Wales, and a Certified Interpretive Host Trainers workshop in Bristol, England.

Pictured: Michael Gondwe of Malawi and NAI Board Member K.C. DenDooven at the NAI International Conference in Sokcho, South Korea. Photo by Gail Vanderstoep.

Statements of Activities and Changes in Net Assets

Years ended December 31	2008			2007				
	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Revenues, Gains, and Other Support								
Membership dues and publications	\$ 731,723	-	-	\$ 731,723	\$ 766,741	-	-	\$ 766,741
Workshop revenue	786,942	-	-	786,942	505,854	-	-	505,854
Advertising income	99,049	-	-	99,049	96,384	-	-	96,384
Contributions	47,749	31,841	5,800	85,390	73,081	32,471	22,002	127,554
Grant income	3,600	-	-	3,600	35,825	-	-	35,825
Other income	43,240	-	-	43,240	42,144	-	-	42,144
Net realized / unrealized gains on investments	-	-	-	-	8,131	-	-	8,131
Other investment income	3,153	-	-	3,153	16,497	-	-	16,497
Income from expiration of life income agreement	-	-	-	-	-	-	-	-
Net assets released from restrictions	47,397	(47,397)	-	-	43,175	(43,175)	-	-
Total revenues, gains, and other support	<u>1,762,853</u>	<u>(15,556)</u>	<u>5,800</u>	<u>1,753,097</u>	<u>1,587,832</u>	<u>(10,704)</u>	<u>34,590</u>	<u>1,611,718</u>
Expenses and Losses								
Program services	1,639,596	-	-	1,639,596	1,510,321	-	-	1,510,321
Support services								
Management and general expenses	150,544	-	-	150,544	156,369	-	-	156,369
Fundraising	9,241	-	-	9,241	9,428	-	-	9,428
Net realized / unrealized losses on investments	60,843	-	-	60,843	-	-	-	-
Interest expense	38,553	-	-	38,553	38,896	-	-	38,896
Total expenses and losses	<u>1,898,777</u>	<u>-</u>	<u>-</u>	<u>1,898,777</u>	<u>1,715,014</u>	<u>-</u>	<u>-</u>	<u>1,715,014</u>
Change in Net Assets	<u>\$ (135,924)</u>	<u>\$ (15,556)</u>	<u>\$ 5,800</u>	<u>\$ (145,680)</u>	<u>\$ (127,182)</u>	<u>\$ (10,704)</u>	<u>\$ 34,590</u>	<u>\$ (103,296)</u>
Net Assets (Deficit), Beginning of Year, As Previously Reported	<u>\$ (436,697)</u>	<u>\$ 222,296</u>	<u>\$ 577,594</u>	<u>\$ 363,193</u>	<u>\$ (231,187)</u>	<u>\$ 233,000</u>	<u>\$ 543,004</u>	<u>\$ 544,817</u>
Prior period adjustment	-	-	-	-	(78,328)	-	-	(78,328)
Net Assets (Deficit), Beginning of Year, As Restated	<u>(436,697)</u>	<u>222,296</u>	<u>577,594</u>	<u>363,193</u>	<u>(309,515)</u>	<u>233,000</u>	<u>543,004</u>	<u>466,489</u>
Change in net assets	<u>(135,924)</u>	<u>(15,556)</u>	<u>5,800</u>	<u>(145,680)</u>	<u>(127,182)</u>	<u>(10,704)</u>	<u>34,590</u>	<u>(103,296)</u>
Net Assets, End of Year	<u>\$ (572,621)</u>	<u>\$ 206,740</u>	<u>\$ 583,394</u>	<u>\$ 217,513</u>	<u>\$ (436,697)</u>	<u>\$ 222,296</u>	<u>\$ 577,594</u>	<u>\$ 363,193</u>

2008 NAI Donors

\$2,000+

Case, John P.

\$100+

Arnold, Kevin

Beesley, Jane

Besharse, Janie

Christensen, Tom

Covel, James F.

Hagood, Reginald

Hodgins, Lester

Hutchinson, Roni

Manus, Grady

Ramey Jr., Ralph

Schmidt, David

Sexton, Phil

Stimson, Nancy

United Way

Wolff, Camra Lee

Youngblood, Lynn

Under \$100

Almas, Gregory

Aprill, Howard

Austin, Lorraine

Bajorek, Roger

Bennett, Brad

Block, Bradley

Boothe, Joan

Brantley, Sandra Gay

Champion, Julie Cerbus

Chandler, Linda

Clark-Gray, Patricia

Claussen, Ron

Cruise West

Daudi, Sabiha

Davies, Thomas

Dechow, Dawn

Duncan, Faith

Ecker, Bonnie

Feist, Colleen

Ford, Amy

Foreman, Gary

Franich, Glenda

Fredericks, Jill

Galperin, Amy

Gates, Randall

George, C. Michael

Green, Karen H.

Hadlock, Nancy

Hiersekorn, Ralf

Hostetter, Karin

Hughes, Henry

Immer, Susan

Jensen, Barbara

Johnston, Dean

Jones-Guggino, Candy

Jones, Kathleen

Kaminski, Ginny

Kelly, Douglas

Kemnitz, Carol

Kortge, Kathleen

Krebs, Nancy

Lamb, Tom

LaMere, Karen

Larimore, Rachel

Lethbridge, Amy

Littlejohn, Margaret

Long, Dodie

Lower Huron, Willow & Oakwoods Emp

Association

Luzader, John C. F.

McClain, Sky

McLaughlin, Jane

McMillan, Whit

Miller, Glenda

Mize, Shawn

Morris, John

Motley, Laura L.

Mott, John

Murphy, Kate

Myslinski, Kristina

NAI Region 3

Nations, Linda

Olien, Mary

Pagliuca, Joan

Parks, Jennifer

Pridemore, Sue

Prigot, Emily

Richardson, Donna

Riolo, Roger

Roberts, Tom

Rodrigues, Michael

Ross, Rebecca

Samples, Cynthia

Sanphillippo, Lisa

Saunders, Jenan

Schmuhl, Russell

Silcox, Frances

Siler, Martha C

Silos & Smokestacks Natl HA

Snow, Abigail & Jay

Sol, Lily

Stebbins, Bruce

Steichen, Kathy

Stevens, Linda

Stevens, Suzanne

Stronge, Maggie

Tuya, Odonbaatar

Vander Stoep, Gail

Webster, Mary Ann

Whitted, M. Leigh

Williams, David

Wittersheim, Frances

Wittersheim, Robert

Woods, Phyllis (Jean)

Wooley, Fred J.

Wright, Dougg

Wright, Jennifer