



National Association for Interpretation

2009 ANNUAL REPORT

Annual Report



NATIONAL ASSOCIATION FOR
INTERPRETATION

P.O. Box 2246
Fort Collins, CO 80522
888-900-8283 toll-free
970-484-8283
970-484-8179 fax
www.interpnet.com

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.

2009 Board of Directors

Executive Committee

Jim Covell, President
Lynn Youngblood, VP for Administration
Donna Richardson, VP for Programs
Nancy Stimson, Secretary
Bruce Stebbins, Treasurer

At-Large Representatives

K.C. DenDooven
Flip Hagood

Region Leadership Council Representatives

Amy Ford
Julie Champion
Linda Strand
Barbara Woodford

Section Leadership Council Representatives

Travis Williams
Todd Bridgewater
Karen Lamere
John Luzader

STAFF

Tim Merriman, Executive Director
Lisa Brochu, Associate Director
Paul Caputo, Art & Publications Director
Jamie King, Membership Manager
Deborah Tewell, Events Manager
Russ Dickerson, Creative Technologies Director
Beth Bartholomew, Business Manager
Carrie Koch, Certification Program Specialist
Lou Anderson, Administrative Assistant

On the cover: NAI member Wil Reding leads a concurrent session titled "Let's Take a Walk ... Outside!" during the 2009 NAI National Workshop in Hartford, Connecticut.



Contents

- 2** The President's Perspective
- 3** From the Executive Director
- 5** From the Associate Director
- 6** InterPress
- 7** Membership
- 8** Certification
- 9** Partnerships
 - Media Awards Competition
 - NAI Heritage Library
- 10** NAI National Workshop
- 11** International Activities
- 12** Financial Report
- 14** 2009 Donors

Participants in the 2009 NAI International Conference in Greece, during an offsite session at the Temple of Apollo in Delphi. Photo by Gail Vander Stoep.

The President's Perspective



Jim Covell

The year 2009 was challenging for NAI. The full brunt of the economic downturn hit us, with reduced revenues from advertising and exhibitors, slow registration for workshops and certification courses and some lost members as interpretive programs were hard hit in many areas. As a result, NAI regions, sections, and the national office had to become more creative and resourceful in maintaining services and operations. The good news is that interpreters are accustomed to being creative and resourceful, so members and staff rose to the challenge without missing a beat.

We were able to hold successful a National Workshop and International Conference, which stayed in the black despite lower than expected attendance. Increasing use of electronic publishing and social network media helped connect the membership while saving printing and mailing costs—and living up to our commitment to green our operations. Most of all, the membership has been understanding and supportive of efforts to operate in more efficient ways.

This was also a time of reckoning for NAI in some ways. The traditionally strong volunteer support for services at the region, section, and even national level was waning, perhaps as many of us were juggling more demands at work. A conversation began about ways to provide member services and conduct operations with fewer rigid constraints and requirements, to provide more flexibility in the structure of the organization as we face increasingly challenging circumstances. That conversation has grown to include many voices and multiple perspectives—and continues into the present and likely well into the future as we continue to tune our structure, processes, and services.

Despite the challenges, the occasional controversy, the hectic pace, and demands of operating this organization, there is this remarkable glue that keeps us all together. We have an intense commitment to our profession, to our fellow interpreters, and NAI is the expression of this commitment. While our resources may be stretched and we face challenging times, the spirit of this organization has never been stronger. Many thanks to all our members, leaders, and staff, who continue to stand by our mission of inspiring leadership and excellence to advance heritage interpretation as a profession.

National Association for Interpretation (NAI) had a good year financially in 2009 after a very challenging one in 2008. The plunge downward by the stock market and restatement of deferred income in 2008 led to a deficit. NAI showed an unrestricted gain in net assets of \$62,634 in 2009 due to careful management of the National Workshop and some growth in invested funds. The unrealized gain on investments amounted to \$30,291.

Membership of 4,304 in 30 countries at the end of 2009 was almost 700 members lower than the end of 2008. Record low attendance of 732 at the National Workshop 2009 in Hartford, Connecticut, was likely the result of a challenging national economy and the resulting cutbacks for travel and training by many agencies and organizations.

NAI finished 2009 with total assets of \$1,426,801 and total net assets of \$273,532. Deferred revenue at the end of 2009 amounted to \$315,126. Total unrestricted revenue and gains in 2009 came to \$1,478,413, almost \$300,000 less than the total revenue in 2008 of \$1,770,358. The smaller National Workshop in 2009 in Hartford, Connecticut, accounted for most of that difference but all income sources were down except investment income and membership dues, fees and publications, which showed modest gains.

The largest asset of the association is the national office building at 230 Cherry Street in Fort Collins, Colorado, and it is valued at \$988,282 after deduction of depreciation of \$245,847. NAI has a mortgage held by Wells Fargo Bank that amounted to \$432,209, which represents an equity position of 57%. The bond-based 4.47% rate for the mortgage matures in August 2024. NAI's endowment fund of \$583,519 grew only \$125 in 2009 and the entire amount is invested in the building owned by the association.

NAI continues to lease 2,700 square feet of space to Rocky Mountain Bird Observatory and several smaller businesses. The revenue from those leases helps NAI meet bond payment obligations with the building mortgage.

The professional staff of eight continues to manage all NAI business activities with Tim Merriman as Executive Director, supervising business activities, and Lisa Brochu as Associate Director, supervising all program activities. Both report separately to the Board of Directors comprised of sixteen elected and appointed members.

The NAI Board of Directors oversees the executive staff and conducts long-range planning that governs the future of the organization. In 2008 it was decided to change the fundraising focus from the Legacy Trust Fund and endowment to the Enos Mills Fund to encourage life memberships and unrestricted donations. This has led to about 20 new Life Memberships in 2009 with a target of increasing life memberships by 200 by 2012, which will bring overall life members to more than 450. These life memberships are recognized as deferred income over a period of 20 years and substantially help NAI with cash flow. They reduce the need for the use of the line of credit and that saves on paying interest expense.

NAI relies on more than 1,000 members annually working as volunteers to operate regional workshops and other programmatic and fundraising activities for the

From the Executive Director



Tim Merriman

association. The 10 geographic regions and 11 sections have their own elected officers and provide specific services to members related to their regions and stated interests. Key partnerships remain as an important way of supporting the National Workshop each year and we appreciate assistance from our partners very much.

Despite two years of economic decline for the association, membership trends are toward growth once again. NAI's mission continues to be "inspiring leadership and excellence to advance heritage interpretation as a profession." NAI's vision is "to be the voice of the profession." The dedicated staff and volunteers continue to put forth extraordinary effort in producing high-quality member services and networking opportunities in pursuit of the stated 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 2009 provided many opportunities to increase the visibility of the organization and once again increase the quantity and quality of membership services.

Highlights of 2009 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
- Initiation of Registered Coach classes in cooperation with National Park Service and Eppley Institute (16 Registered Coaches in 2009)
- Fourth annual NAI International Conference held in Athens, Greece
- 18 Certified Interpretive Trainers recognized for certifying over 100 individuals
- National Workshop held in Hartford, Connecticut, with over 700 participants
- Continuation of quarterly meetings of an Advisory Council with the purpose of providing creative thinking related to improving lines of business
- Initiation of Program Audit Committee quarterly meetings
- Initiation of two additional "Standards and Practices" documents that detail best practices in the field
- Continuation of a project intended to document a "Road Map to a Career in Interpretation"
- 2 Certified Interpretive Planners courses taught in Canada
- Planning initiated for the Civic Tourism III conference to be held in August 2010.

From the Associate Director

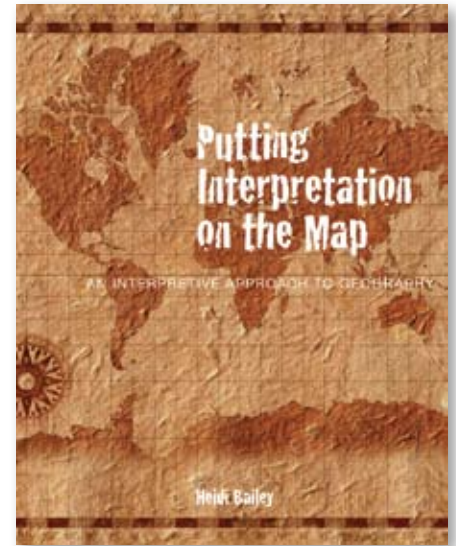


Lisa Brochu

InterpPress

In accordance with NAI's mission statement, NAI's publishing imprint, InterpPress, publishes books that improve the profession of interpretation over the long term. This year, InterpPress shifted its focus from printed books to titles for sale as downloadable pdfs or print-on-demand books through Amazon. In 2009, NAI published its first title available through these avenues, *Putting Interpretation on the Map: An Interpretive Approach to Geography* by Heidi Bailey.

Putting Interpretation on the Map: An Interpretive Approach to Geography is a handbook for front-line interpreters, managers, and planners on incorporating maps and other geographic technologies into interpretive media, exhibits, and programs. This electronic book reviews basic geography concepts and map skills, and introduces resources from simple map activities to the most advanced geotechnologies.



Other titles available through InterpPress are *Personal Interpretation* by Lisa Brochu and Tim Merriman (second edition published in 2008, first published in 2002),

Interpretation By Design: Graphic Design Basics for Heritage Interpreters by Paul Caputo, Shea Lewis, and Lisa Brochu (2008), *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. *Legacy* is available online at www.onlinelegacy.org.
- *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, NAI's blogs and publications, Enos Mills Fund, and more. *NAI Now* will go semi-monthly in 2010.
- *The Interpretive Sourcebook* and *The International Conference Proceedings* are available electronically to participants in NAI events, and in collections for sale on CD-ROMs on the NAI store.

In 2009, we hit our high of 5,073 members in February. We averaged around 4,800 members throughout the year. Membership brought in \$328,622.

The beginning of the year saw a change in our membership structure. Associate membership was replaced by an entry-level membership for first-year members. We also did away with the standard membership on each level and offered a single student-level membership, allowing for a less confusing membership structure. This also allows for every member of NAI to receive *Legacy* magazine.

Sales in the association store, which sells NAI logo items, books, and other publications came in at \$60,339. Income was down a bit from the previous year, partly due to low attendance at the National Workshop in Hartford.

In 2009, NAI began maintaining four blogs written by NAI leaders and authors of books published by InterPress, allowing members a forum to discuss topics relevant to the association and the profession:

- The *NAI Blog* by NAI President Jim Covell and Executive Director Tim Merriman (www.interpnet.com/naiblog)
- *Interpretive Planning* by NAI Associate Director Lisa Brochu (www.interpretiveplans.com)
- *Interpretation By Design* by NAI Art Director Paul Caputo and Shea Lewis, superintendent of Parkin Archeological State Park in Arkansas (www.interpretationbydesign.com)
- *Applied Interpretation* by Doug Knapp, associate professor at Indiana University (www.appliedinterpretation.com)

A strong social networking presence has remained on Facebook, where the NAI page (pictured) topped 1,000 fans. In growing our Facebook presence, Shea Lewis and Paul Caputo have taken their *Interpretation By Design* blog to the Facebook community and we have seen a number of regions and sections set up their own pages. We continue to support the LinkedIn and MySpace sites and have started a Twitter feed and a YouTube channel.



Membership

Pictured: NAI's Facebook page topped 1,000 fans in 2009.

Certification



Pictured: A 2009 Interpretive Planning class at a new facility in Mecklenburg County, North Carolina.

Due to changes in the database, our last report for the year of accumulated totals of certified individuals was conducted in July 2009. 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. By the end of 2009, NAI's certification program had been recognized in 15 countries, with Certified Interpretive Guides coming from over 40 countries. The CIG program has also been adopted by over 40 universities and colleges in the United States, helping students who do not yet qualify for the peer-reviewed professional certification categories to attain seasonal employment more easily while they complete their degrees.

	2003	2004	2005	2006	2007	2008	2009 (July)	Applied
CIT	133	175	209	287	369	429	452	798
CIM	9	15	20	25	29	35	35	102
CIP	11	21	28	55	93	121	127	543
CHI	26	37	47	61	83	91	67	193
CIG	1344	2289	2954	4045	5079	6236	6673	7436
CIH	56	180	294	450 (97)	523	624 (116)	640 (126)	661 (157)
Total	1579	2717	3552	4923	6176	6951	8120	9890

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 2009. We wish to recognize their contributions and thank them for being open to continued work with NAI in the future. They are:

Local Partners

Eppley Institute
National Park Service
Rocky Mountain Bird Observatory
Your True Nature

Sponsors and Partners of the 2009 NAI National Workshop

US Forest Service
National Park Service
US Fish & wildlife Service
US Army Corps of Engineers
KC Publications
Mystic Aquarium
ARKive
Greater Hartford Convention & Visitors Bureau

The Media Awards were presented November 18, the first morning of the NAI National Workshop in Hartford, Connecticut. Thirty-three judges reviewed 66 entries in 11 categories. The Interpretive Media Section worked with staff to coordinate the competition, judge the entries, and distribute feedback to participants.



In 2009 NAI's Heritage Library was the recipient of several donations from members. While book donations expanded the library, a volunteer spent many hours cataloging the Howdy Weaver Collection of books, and papers that was donated last year.

Partnerships

Media Awards Competition

NAI Heritage Library

NAI National Workshop



Pictured: Sam Ham delivers a keynote address in Hartford.

The National Workshop attracted 670 participants to Hartford, Connecticut, November 17–21, 2009. Keynote presentations from Sam Ham, who spoke to us the theoretical basis of “interpretation to protection” and Karolyn Smardz Frost, who told us about interpreting an archeological dig of the Underground Railroad in Toronto, set the tone for the workshop.

More than 100 concurrent sessions covered an array of topics. One day of offsite sessions sent participants across Connecticut to learn about culture, history, ecosystems, wildlife, and interpretive facilities. Preworkshop sessions gave participants in-depth looks at a variety of topics. Special evening events took participants to several different places to see Hartford after dark: a dinner cruise on the water, a riverfront clam bake, and the innovative “Superstars of Interpretation.”

Awards ceremonies, receptions, and networking combined with the events to make this a very memorable, high-energy workshop despite the lower than usual turn-out.

Sponsors and Partners of the 2009 NAI National Workshop

US Forest Service
National Park Service
US Fish & wildlife Service
US Army Corps of Engineers
KC Publications
Mystic Aquarium
ARKive
Greater Hartford Convention & Visitors Bureau

International Activities



The economic downturn that hit worldwide early in 2009 coupled with a global outbreak of H1N1 flu virus in April impacted attendance at the fourth annual international conference, but approximately 80 strong-willed individuals from 20 countries still attended the May event in Athens, Greece. 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 fifth conference was planned for Townsville, Australia, to be held in cooperation with the City of Townsville and Interpretation Australia (IAA) in April 2010.

In addition to strengthening ties with IAA (with whom NAI holds a Memorandum of Understanding), NAI worked with Parks Canada, Interpretation Canada members, and NAI members in Canada to bring two planning workshops to our neighbors to the north.

NAI's executive staff was invited (at the expense of US-China Environmental Fund-Panda Mountain) to witness the tragic loss of the Giant Panda Breeding and Conservation Center in Wolong, China following the 2008 earthquake to determine how NAI members might be of assistance to this facility as the Wolong Special Administration begins to rebuild. Over the period of 2001–2004, more than a dozen NAI members volunteered their time to develop interpretive components at the facility.

Pictured: Participants at the NAI International Conference in Greece during an offsite session to Cape Sounion.

Financial Report

Prepared by Brock and Company, CPAs PC

Statements of Financial Position

December 31	2009	2008	2009	2008
ASSETS				
Current Assets				
Cash and cash equivalents	\$ 36,755	\$ 21,047		
Investments	108,610	77,211		
Accounts receivable, net of allowance of \$7,500	88,698	82,711		
Inventories	188,939	190,611		
Other current assets	922	91		
Total current assets	<u>421,924</u>	<u>372,671</u>		
Property and Equipment, net	988,282	1,028,711		
Other Assets				
Contributions receivable	16,595	30,911		
Total assets	<u>\$ 1,426,801</u>	<u>\$ 1,432,393</u>		
LIABILITIES, DEFERRED REVENUE AND NET ASSETS				
Liabilities				
Current Liabilities				
Accounts payable	\$ 11,227	\$ 102,211		
Line of credit	290,000	220,011		
Current portion of long-term debt	35,327	41,511		
Accrued payroll and payroll taxes	41,296	48,011		
Other accrued liabilities	28,084	26,911		
Total current liabilities	<u>405,934</u>	<u>438,751</u>		
Long-Term Debt, net of current portion	432,209	467,111		
Total liabilities	<u>838,143</u>	<u>905,862</u>		
Deferred Revenue	315,126	308,811		
Net Assets (Deficit)				
Unrestricted	(509,987)	(572,611)		
Temporarily restricted	200,000	206,711		
Permanently restricted	583,519	583,311		
Total net assets	<u>273,532</u>	<u>217,811</u>		
Total liabilities, deferred revenue and net assets	<u>\$ 1,426,801</u>	<u>\$ 1,432,393</u>		

Statements of Activities and Changes in Net Assets

Years ended December 31

2009

2009

2008

	2009			2008				
	Unrestricted	Temporarily Restricted	Permanently Restricted	Total	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Revenues, Gains, and Other Support								
Membership dues, fees and publications	\$ 742,725	-	\$ -	\$ 742,725	\$ 739,228	\$ -	\$ -	\$ 739,228
Workshop revenue	513,845	-	-	513,845	786,942	-	-	786,942
Advertising income	64,150	-	-	64,150	99,049	-	-	99,049
Contributions	78,348	-	125	78,473	79,590	-	5,800	85,390
Grant income	-	-	-	-	3,600	-	-	3,600
Other income	38,441	-	-	38,441	43,240	-	-	43,240
Net unrealized gains on investments	30,291	-	-	30,291	-	-	-	-
Other investment income	3,873	-	-	3,873	3,153	-	-	3,153
Net assets released from restrictions	6,740	(6,740)	-	-	15,556	(15,556)	-	-
Total revenues, gains, and other support	<u>1,478,413</u>	<u>(6,740)</u>	<u>125</u>	<u>1,471,798</u>	<u>1,770,358</u>	<u>(15,556)</u>	<u>5,800</u>	<u>1,760,602</u>
Expenses and Losses								
Program services	1,239,186	-	-	1,239,186	1,645,750	-	-	1,645,750
Support services								
Management and general expenses	133,139	-	-	133,139	151,895	-	-	151,895
Fundraising	8,247	-	-	8,247	9,241	-	-	9,241
Net realized and unrealized losses on investments	-	-	-	-	60,843	-	-	60,843
Interest expense	35,207	-	-	35,207	38,553	-	-	38,553
Total expenses and losses	<u>1,415,779</u>	<u>-</u>	<u>-</u>	<u>1,415,779</u>	<u>1,906,282</u>	<u>-</u>	<u>-</u>	<u>1,906,282</u>
Change in Net Assets	<u>\$ 62,634</u>	<u>\$ (6,740)</u>	<u>\$ 125</u>	<u>\$ 56,019</u>	<u>\$ (135,924)</u>	<u>\$ (15,556)</u>	<u>\$ 5,800</u>	<u>\$ (145,680)</u>
Net Assets (Deficit), Beginning of Year,	\$ (572,621)	\$ 206,740	\$ 583,394	\$ 217,513	\$ (436,697)	\$ 222,296	\$ 577,594	\$ 363,193
Change in net assets	<u>62,634</u>	<u>(6,740)</u>	<u>125</u>	<u>56,019</u>	<u>(135,924)</u>	<u>(15,556)</u>	<u>5,800</u>	<u>(145,680)</u>
Net Assets (Deficit), End of Year	<u>\$ (509,987)</u>	<u>\$ 200,000</u>	<u>\$ 583,519</u>	<u>\$ 273,532</u>	<u>\$ (572,621)</u>	<u>\$ 206,740</u>	<u>\$ 583,394</u>	<u>\$ 217,513</u>

2009 NAI Donors

Enos Mills

Trailblazer 200

(NAI Life Members)

Mullins, Gary

Block, Bradley

Miller, John D.

Miller, Kathy

Boland, Jeff

Smith, Michael

Ruterbories, Michael

Beckert, Douglas

Simons, Don

Putnam, Andrea

Johnson, Adrienne

Vance, Jill

Morris, Mary J. "Jodi"

Lethbridge, Amy

Benton, Gregory

Long, Dodie

Champion, Julie Cerbus

Skinner, Sara

Stebbins, Bruce

\$1,000+

Beckert, Douglas

DenDooven, K. C.

Dimse, Steve

Gundrum, Laura

Johnson, Harold

McHenry, Bruce

NAI Region 6

Scheeter, Donna

Szabo, Bert

\$100+

Best, Dan

Christensen, Tom

Covel, James F.

Duncan, Faith

Feist, Colleen

Langdon, Susan

Price, Jim

Richardson, Donna

Sexton, Phil

Stevens, Linda

Valoppi, Valerie

Under \$100

Aschenbeck, Laura

Beck, Larry

Berger, Mary

Claussen, Ron

Coffman, Taylor

Conner, Maryellen

Csonka, Ann

Curthoys, Lesley

Drathring, Lyn

Duckor, Jonathan

Feist, Colleen

Foreman, Gary

Hostetter, Karin

Hower, Deta

Johnston, Dean

Kaplan, Alan

Lansberg, Shoshanna

Major, Annabel

McLane, Ardrianna

Moore, Myfe

Nelson-Embry, Sharol

Nelson, Christian

Newquist, James

Pridemore, Sue

Reddrop, Lynne

Rohling, Jane

Samerdyke, Mary

State of Colorado Open Space &

Mountain Parks

Stinchcomb, ZoeAnn

Stronge, Maggie

Toth, Norah

Whatley, Mike