

Interpretive Planning

National Association for Interpretation

The National Association for Interpretation is a nonprofit professional organization with the mission of inspiring leadership and excellence to advance heritage interpretation as a profession. In 2008, the organization had over 5200 members in over 25 countries. It provides a variety of programs, products and services to the profession including regional, national, and international conferences; publications; certification of individuals; training; and supports facilitation of collaborative efforts such as the Definitions Project and development of Standards and Practices.

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.

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Project Background

The collective membership of NAI represents a multitude of agencies and organizations, including government agencies at all levels, private nonprofit organizations, commercial enterprises, and academic institutions. With this diversity, it is understandably difficult to provide standards of practice for the entire profession; however, it is a frequently requested item from the NAI office as interpretive organizations strive to improve their operations and provide justification for the important work of their staff and volunteers.

In 2007, the NAI Board of Directors mapped a strategic plan for the profession that included a strategic vision that the interpretive profession will have a foundation of universally accepted standards. To that end, a focus group of individuals representing the diversity within NAI's membership was assembled and contributed to this documentation of preferred practices for interpretive planning.

This document is not intended to serve as the ultimate authority on establishing preferred practices; however, it captures the essence of a variety of benchmarks that can be used by any individual or interpretive organization that engages in interpretive planning to determine areas in which they excel or might improve. Certainly, it would be appropriate for specific types of organizations to develop standards for planning within those organizations. Since NAI serves the greater profession rather than any one agency or type of organization, this more generalized approach can be considered an umbrella of standards and practices suitable for the interpretive profession overall.

It is anticipated that this document will undergo periodic revision to remain responsive to constantly changing economic, ecological and social environments.

Comments or suggestions for revision may be forwarded to: NAI Best Practices, PO Box 2246, Fort Collins CO 80522 or naiprograms@aol.com.

Terminology

For the purposes of this document, an **interpretive plan** is considered the documentation of a thoughtful decision-making process that blends management needs and resource considerations with visitor desire and ability to pay to determine the most effective way to communicate the message to targeted markets. An **interpretive organization** is considered an agency or organization that manages a site or company that employs methods of interpretation in their daily business. Examples might be national parks, county parks, community nature centers, zoos, aquariums, botanical gardens, theme parks, tour companies, cruise lines, or museums.

Due to the variety of individuals or organizations that might be using this document, it is assumed that the user will substitute appropriate terminology for the situation. For example, a museum or zoo's **resource** might be its collection, while a park's resource might be the significant natural features of the landscape. **Governance** of a nature center might be a board of directors, while governance of a city-owned botanical garden might be the city council. A **site** might be a building, a boat, or a land base of several hundred or thousand acres.

Terminology used is consistent with the Definitions Project, www.definitionsproject.com.

How to Use this Document

The Standards and Practices are divided into thirteen benchmarks that appear to be important components in the development of an interpretive plan. Each of these benchmarks is then divided into three levels of achievement. Good practices suggest the minimum level of achievement for basic operations. Better practices generally include "good" practices but advance the achievement to preferred operations. Best practices generally include both "good" and "better" practices and add a level of achievement that may or may not be achievable given an organization's financial, physical or managerial realities. In other words, the "best" practices suggested here are what a planner in a perfect world might hope to achieve if he or she has all the operational resources required.

An individual or organization can use the suggested practices in any category to evaluate their own performance. Choosing to use these standards to provide benchmarks for success may enable an individual or organization to become better positioned to attract support or business, and to better serve constituents.

It is hoped that this document will stimulate critical thinking and planning strategies that may improve the overall success of an individual or organization and the profession as a whole. It can be used as a stimulus for planning strategic initiatives once an honest self-assessment takes place and is discussed amongst staff, management, governance and stakeholders.

ADVOCACY

Interpretive organizations must have advocates and be advocates for their resources. The interpretive plan should:

Good Practice

Address advocacy goals as appropriate.

Better Practice

Address advocacy goals as appropriate.

Best Practice

Address advocacy goals as appropriate.

Include advocacy related elements in alignment with organizational goals if appropriate.

Include advocacy related elements in alignment with organizational goals if appropriate.

Identify outcomes and impacts desired from advocacy efforts in a logic model.

AUDIENCE ANALYSIS

Understanding the audience is critical to the success of the plan. The organization engaged in interpretive planning processes:

Good Practice

Uses focus groups, surveys, civic engagement and direct observation or other methods as appropriate to assess audience needs and preferences.

Considers audience needs and preferences in planning process.

Better Practice

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Best Practice

Uses focus groups, surveys, civic engagement and direct observation or other methods as appropriate to assess audience needs and preferences.

Considers audience needs and preferences in planning process.

Collects and analyzes visitor perception of resources and programming through informal discussion and observations of staff.

Uses information about visitors regularly collected by staff on data sheets such as questions asked, where people are from and why people are coming to the organization.

Uses staff reports and other methods to collect visitor data and prepares annual trend reports that can be used in planning.

Collects and analyzes visitor perception of resources and programming through informal discussion and observations of staff.

Uses information about visitors regularly collected by staff on data sheets such as questions asked, where people are from and why people are coming to the organization.

Uses staff reports and other methods to collect visitor data and prepares annual trend reports that can be used in planning.

Hires an outside source or assigns an in-house team every five years to do an analysis of visitation trends and the implications for interpretation.

CIVIC ENGAGEMENT

Successful interpretive plans usually include stakeholder involvement and/or public input. It is suggested that the:

Good Practice

Interpretive planning process includes at least one civic engagement opportunity.

Better Practice

Interpretive planning process includes at least one civic engagement opportunity.

Interpretive planning process includes one or more opportunities for key stakeholders and audiences to have input and review the plan document.

Best Practice

Interpretive planning process includes at least one civic engagement opportunity.

Interpretive planning process includes one or more opportunities for key stakeholders and audiences to have input and review the plan document.

Drafts and final interpretive master plan are available to key stakeholders through varied means.

EVALUATION

Evaluation should be built into the planning process at multiple stages. Specifically, it is recommended that:

Good Practice

New programs and products are developed after an evaluation of existing Interpretive Program and review of visitor interests.

A logic model exists in the interpretive plan that identifies measurable outputs, outcomes and impacts.

Better Practice

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A logic model exists in the interpretive plan that identifies measurable outputs, outcomes and impacts.

During the planning process, the organization conducts focus groups or other evaluation techniques to get visitor feedback and suggestions about new programs, products or services.

During the planning process, the organization conducts focus groups or other evaluation techniques to get visitor feedback and suggestions about new programs, products or services.

During the development stage of new products the organization tests visitor reactions through mock-ups of exhibits and other media.

Following implementation of the plan, evaluation of results based on the logic model is conducted within a specified time frame.

Plan document should specify methodologies that will be used for future evaluation of existing programs and new ones under development.

MANAGEMENT OBJECTIVES

Interpretation methods and content should align with management objectives. Therefore, it is important that:

Good Practice

The organization has measurable management objectives.

Management objectives are included in the interpretive plan.

Better Practice

The organization has measurable management objectives.

The interpretive plan includes a logic model with outcome and impact objectives that achieve management goals.

The organization evaluates its management objectives every few years.

Best Practice

The organization has measurable management objectives.

The interpretive plan includes a logic model with outcome and impact objectives that achieve management goals.

The organization evaluates its management objectives every few years.

The organization shows results of evaluations of management objectives in an annual report.

The site manager and/or resource managers are actively involved in interpretive plan development.

MARKETING FACTORS

Understanding the market climate and niche can help in achieving success. The interpretive plan:

Good Practice

Segments current and potential audiences in meaningful and realistic ways relevant to the project.

Investigates and analyzes complementary and competitive operations.

Is developed in tandem with the organization's marketing plan to ensure consistency of message.

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Segments current and potential audiences in meaningful and realistic ways relevant to the project.

Investigates and analyzes complementary and competitive operations.

Is developed in tandem with the organization's marketing plan to ensure consistency of message.

Considers promotional materials as interpretive media opportunities to begin delivery of the message.

Considers promotional materials as interpretive media opportunities to begin delivery of the message.

Prepares pricing structures for recommended media as appropriate taking into consideration what the market will bear and actual operational costs.

MEDIA DESCRIPTIONS

The interpretive plan clearly indicates the mix of media required to convey the message(s) to specific audiences. To accomplish this effectively:

Good Practice

Media descriptions are included in interpretive plan and suggest target audience, theme relationship, location, and physical description.

Better Practice

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Media descriptions are included in interpretive plan and suggest target audience, theme relationship, location, and physical description.

Media descriptions provide adequate detail for designers to follow in creation of construction documents.

Media descriptions provide guidance for text writers and illustrators in preparing draft text and images.

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Media descriptions provide guidance for text writers and illustrators in preparing draft text and images.

Media descriptions are aligned with specific goals and objectives in the interpretive plan.

MESSAGE ELEMENTS

Message elements include central theme, subthemes, and storylines. To keep these elements in alignment and ensure appropriateness:

Good Practice

Plan should document the site's significance.

Message elements relate to a central theme or big idea to be conveyed to the audience.

Better Practice

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Best Practice

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Message elements relate to a central theme or big idea to be conveyed to the audience.

No more than four sub-themes are planned for a specific site, building, collection, or media piece.

No more than four sub-themes are planned for a specific site, building, collection, or media piece.

Themes and message elements clearly align with specific interpretive plan objectives and no objectives lack message elements to support them.

OPERATIONAL COMMITMENT

The best plan cannot be implemented without support. To ensure that support will be available for implementation, it is recommended that:

Good Practice

The organization does an evaluation of cost for future programs and projects in the planning process and is aware of anticipated cost increases.

Operations personnel are involved in development of the interpretive plan.

Better Practice

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Best Practice

The organization does an evaluation of cost for future programs and projects in the planning process and is aware of anticipated cost increases.

Operations personnel are involved in development of the interpretive plan.

The organization has a detailed cost analysis and/or business plan for any new programs or products that identifies where capital and operating costs will be coming from.

The interpretive plan addresses the operational requirements of any new facilities, products or programs developed.

Plan should include a schedule for completion of the plan's elements.

The organization has a detailed cost analysis and/or business plan for any new programs or products that identifies where capital and operating costs will be coming from.

The interpretive plan addresses the operational requirements of any new facilities, products or programs developed.

Plan should include a schedule for completion of the plan's elements.

The plan includes signed commitments from partners if they are essential to the success of the project.

Money and resources for development of new interpretive facilities, services, and programs are available before development begins.

The interpretive plan is updated or revised as operations issues develop.

PARTNERSHIPS

Most interpretive organizations require partners for cost-effective operations. Therefore, the interpretive plan requires that:

Good Practice

The organization consider complementary and competitive programs that occur in their region when developing interpretive plans.

Potential partners are identified in the planning process.

The organization works with partnership groups to better understand their niche in providing interpretive opportunities in a given area.

Better Practice

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Best Practice

The organization consider complementary and competitive programs that occur in their region when developing interpretive plans.

Potential partners are identified in the planning process.

The organization works with partnership groups to better understand their niche in providing interpretive opportunities in a given area.

The organization involves partners in their planning process.

MOUs or MOAs with key partners are considered in the planning process.

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MOUs or MOAs with key partners are considered in the planning process.

The organization has a network of people from different organizations who comment on plans and take part in planning processes.

Interpretive planning efforts include information from partners to develop programs that build on interpretive messages throughout the region.

STAFF/VOLUNTEER TRAINING

Staff and volunteers are usually responsible for implementation of the plan. It is suggested that:

Good Practice

A recommendation for staff and volunteer training is made in the interpretive plan to maximize the effectiveness of planned activities and media.

Better Practice

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Best Practice

A recommendation for staff and volunteer training is made in the interpretive plan to maximize the effectiveness of planned activities and media.

The interpretive plan identifies specific training that will support planned development.

The interpretive plan identifies specific training that will support planned development.

The interpretive plan identifies specific outcomes and/or impacts for training.

STAKEHOLDER INVOLVEMENT

Stakeholders may include partners, volunteers, staff, governance, user groups and others. To help ensure success in planning, it is recommended that:

Good Practice

Key stakeholders are involved in planning through focus groups or public meetings.

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Best Practice

Key stakeholders are involved in planning through focus groups or public meetings.

Key stakeholders get updates on the plan and are asked for comments through websites or direct communication.

Key stakeholders get updates on the plan and are asked for comments through websites or direct communication.

An advisory group of key stakeholders or cooperative meets regularly to review progress of the plan implementation.

TERMINOLOGY

Consistent vocabulary helps avoid costly misunderstandings. It is recommended that:

Good Practice

Terminology is agreed upon amongst staff and any consultants involved in the planning process.

Better Practice

Terminology is agreed upon amongst staff and any consultants involved in the planning process.

Best Practice

Terminology is agreed upon amongst staff and any consultants involved in the planning process.

Terminology is used consistently from year to year.

Terminology is used consistently from year to year.

Terminology is consistent with the Definitions Project.

VISITOR EXPERIENCE

Ultimately, the interpretive plan defines the visitor experience. It should:

Good Practice

Clearly describe the visitor experience.

Consider safety and security issues of both the visitor and the resource.

Better Practice

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Best Practice

Clearly describe the visitor experience.

Consider safety and security issues of both the visitor and the resource.

Provide opportunities for visitors to understand and appreciate the resource.

Provide opportunities for visitors to connect with the resource both emotionally and intellectually.

Enable visitors to make sound decisions and prepare for their experience through consideration of how to provide adequate information, orientation material and maps.

The interpretive plan considers that visitors need to get questions answered easily through contact with staff.

Provide opportunities for visitors to understand and appreciate the resource.

Provide opportunities for visitors to connect with the resource both emotionally and intellectually.

Enable visitors to make sound decisions and prepare for their experience through consideration of how to provide adequate information, orientation material and maps.

The interpretive plan considers that visitors need to get questions answered easily through contact with staff.

Provide opportunities for peak experiences and self-actualization.

Encourage a commitment from visitor beyond the immediate experience by provoking further thought or action.

Be planned holistically to include the decision to visit (promotional materials), the entry (including the journey to the site), the connections that are made through on-site interpretive media and programs, the exit (including the journey home or to another destination), and the commitment on the part of the visitor to change their attitude or behaviors or to support or recommend the site or organization to others.