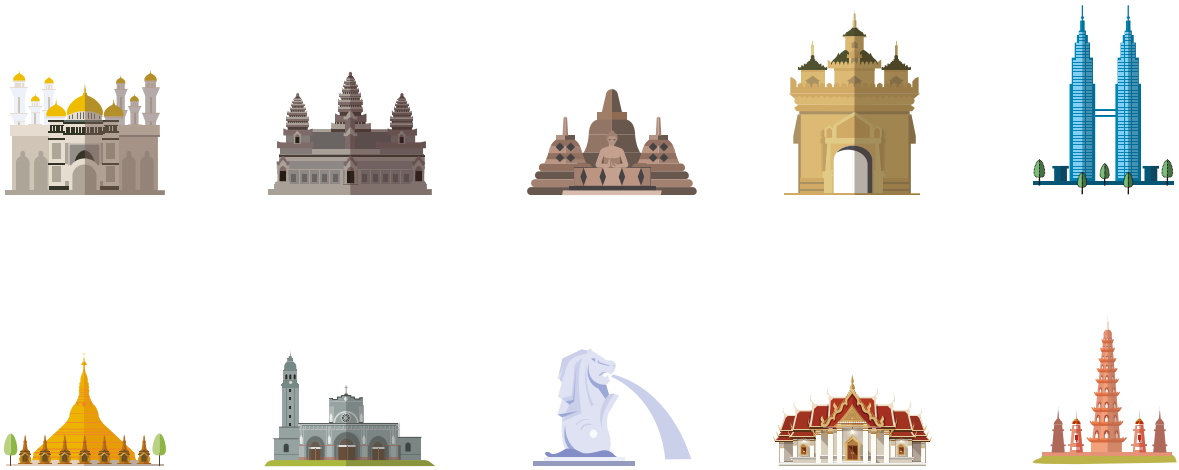
ASEAN-JAPAN CENTRE

WORKBOOK

on Interpretive Planning for ASEAN Tourism and Concept of Interpretation

By ASEAN-Japan Centre



Southeast Asia
feel the warmth

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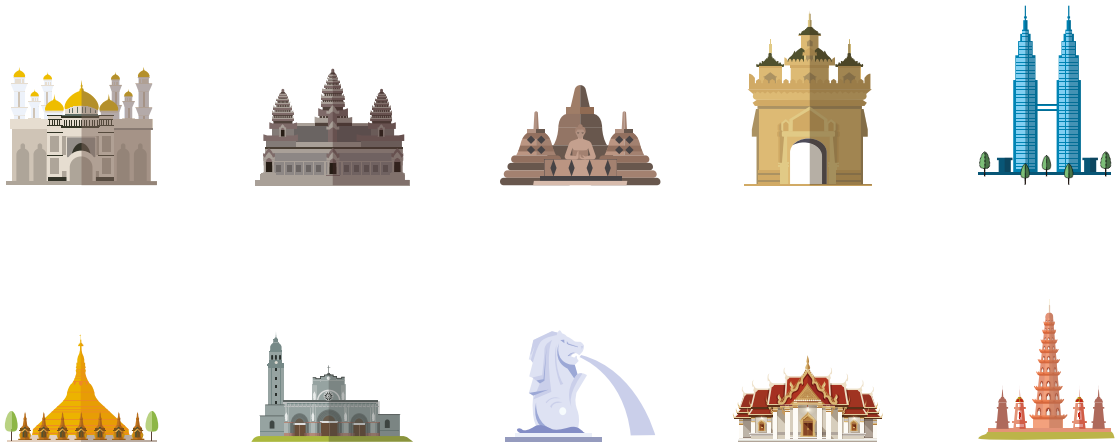

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PREFACE

This workbook is a complement to the publication by the ASEAN-Japan Centre (AJC) and Ecologic on interpretation for professional tourism guides (Interpretive Guide for Sustainable Tourism, 2020). The Centre's work on interpretation is based on the belief that sustainable tourism can be maintained and even enhanced by understanding better and implementing interpretation practices at the levels of both management and field (e.g. guided tours). This workbook targets the people at the management level.

This workbook provides an overview of an interpretive master plan, also called an interpretive management plan or interpretive plan. It is not about planning or designing an interpretive program, such as a guided walk, talk, presentation, exhibit, sign or brochure, but about planning an approach to interpretive programs overall in a particular site. A site may be a bounded area, such as a national park, heritage site, protected area or trail that usually involves multiple locations to visit within the boundary. It may be also a facility, such as a museum, nature centre, science centre, gallery or visitor center that typically has a collection of targeted tourism resources. On such a site, interpretive programs are planned in terms of theme (what), target audience (who), type of media (how), and need and outcome (so what), within the management goals of the site (why).

Interpretation in tourism signifies the revelation of the value and meaning of a natural, cultural and historical resource that a tourist is seeing, hearing or experiencing. The planning to embody that interpretation at tourism sites is necessary to sustainably protect and manage the site.

This workbook will help you develop an interpretive plan for visitor services and resource protection at a site you manage or work at. It will help you determine

- The most efficient and effective approaches to communicate the purpose, significance and themes of the site
- Appropriate means to achieve desired visitor experiences and provide opportunities for audiences to make meanings of the resources at the site
- Logical approaches to sustaining the tourism use of the site

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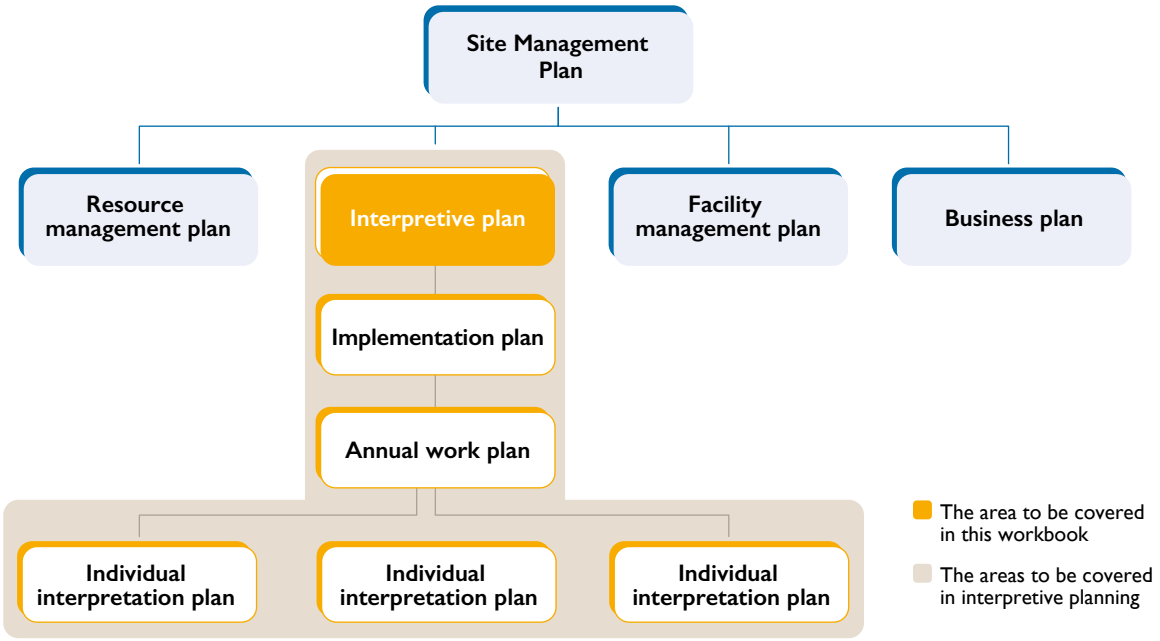
INTRODUCTION

An interpretive plan offers a guideline for interpretive programs, visitor services and related resource protection issues, usually over the a period of five to ten years. To put the plan into practice, an implementation plan should be developed in accord with the interpretive plan (figure 1).

Any interpretive planning should include an implementation plan that is supplemented with an annual work plan and an individual interpretation plan (box 1).

Figure 1. Planning perspective



Box 1. Types of plans used in interpretive planning

Implementation Plan

This plan lists those actions necessary to implement the interpretive plan, assigns responsibility and sets target dates. It describes the actions to be taken over the next five to ten years.

Annual Work Plan

This plan includes the actions that are described in the implementation plan along with responsibility for each action, and due dates for each action within a particular year. This plan links the interpretive plan to the annual operation.

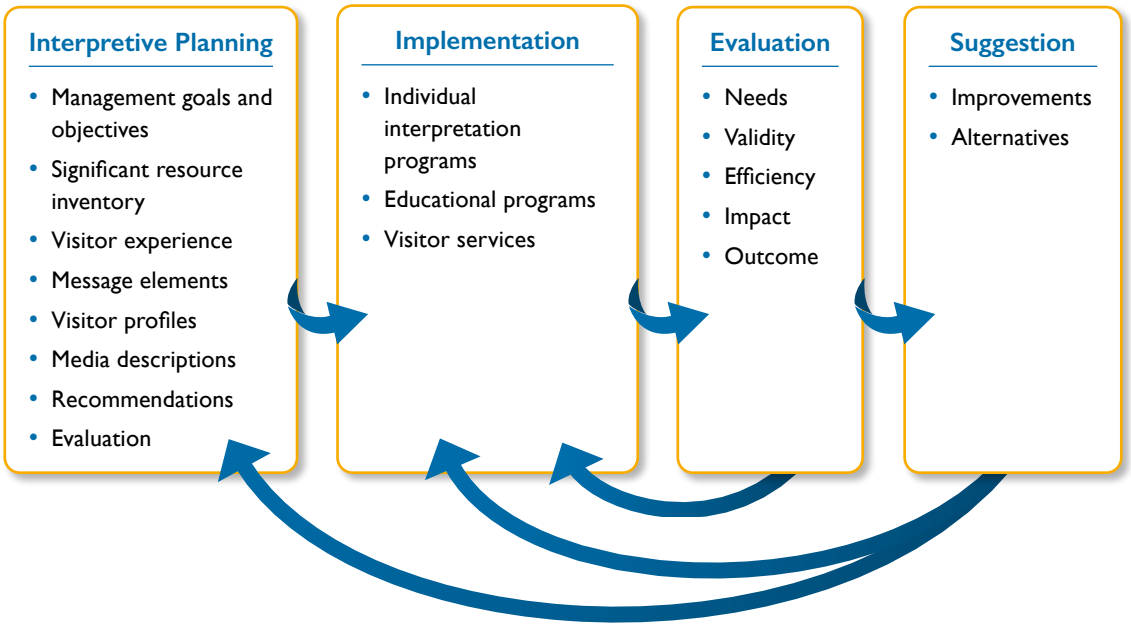
Individual Interpretation Plan

This plan includes outlines for interpretive programs for the coming year. Each interpretive program needs to be designed on the basis of the purpose and directions that are described in the interpretive plan.

This workbook is designed to introduce the concept of interpretation (see AJC and Ecologic's Interpretive Guide for Sustainable Tourism, a complementary publication of this workbook, for its practical use) and the components of the interpretive plan, focusing particularly on the eight major components essential for interpretive planning: management goals and objectives, a significant resource inventory, the visitor experience, message elements, an audience analysis, media descriptions, recommendations and evaluation. As is the nature of a workbook, the components are described in textbook style and supplemented with real-world examples and cases, as well as exercises.

Interpretive planning is the iterative process leading to further improvements in the management and operation of four stages: interpretive planning, implementation, evaluation and suggestion (figure 2). The cycle starts with the definition and clarification of the concept of interpretive planning and ends with suggestions that come back to the concept of interpretive planning, an analogy to the PDCA cycle — "plan" or interpretive planning, "do" or implementation, "check" or evaluation, and "action" or suggestion.

Figure 2. The process of interpretive planning and implementation of the plan



Creating customer (visitor) value and satisfaction is at the heart of the tourism industry. The entire visitor experience can be thought of as a product because it requires an expenditure of time and money by the visitor. Marketing, because it entails defining target visitors and their needs, will help you sell and promote the visitor experience.

Understanding the market environment in which you are planning to operate and who you intend to serve is critical for determining the most effective and economical means of doing so. Interpretive planning should serve as a management tool for effectively marketing tourism sites and minimizing resources for managing sites (time, money, efforts, and people). Marketing has five elements (5 Ps) and each has a host of considerations (table 1).

Table 1. Five Ps of tourism marketing

Tourism marketing element	Considerations for each element
Product	• What visitor experience do you want to offer? • What kind of programs do you like to offer? • Is there a match between visitors' interests and what your organization wants to do? • What value do you provide to your visitor with a program?
Price	• How much does it cost to develop a program? • How much is your visitor audience willing to pay for the program?
Place	• Where do you want to deliver an interpretive program? • Is this the best location to serve your targeted audience?
Promotion	• How do you inform visitors about your product? • When do you communicate? • Where do you communicate?
Publics	• Who do you want to target? • Do such targeted visitors exist in the area? • How much time are such visitors able to spend in the area?

Source: AJC.

I. INTERPRETATION

Interpretation is simply an approach to communication (Ham, 2013, p. 1)

Who Are Interpretive Guides?

This workbook first looks at the concept of interpretation. The actual and practical use of interpretation in guided tours in plain language can be seen in the separate publication by AJC on interpretation (AJC and Ecologic, 2020). Interpretation communicates an idea or a concept of what is being seen, heard, or experienced by audiences at an informal learning setting. It attempts to make a personal meaning for visitors and help them make connections with an object or process to interpret them in an easily understandable and enjoyable way, so that the audience can appreciate the meaning and value inherent in it. Interpretation typically involves communication in settings such as museums, parks, historic sites, zoos, aquariums, and botanical gardens as well as wineries, breweries, and food factories. To put it simply, interpretation gets a message across to the audiences who seek to enjoy a meaningful time at the site.

Tour guides, also called interpreters or interpretive guides, can reveal the meaning and value of aspects of environmental, cultural, and historical heritage. Tour guides play a key role in enhancing the audiences' experience, as they can help the audiences make a personal connection with the tourism resource that they experience. They may be called naturalists, historians, cruise guides, curators, docents, or heritage guides, also national park rangers or forest rangers. AJC and Ecologic have identified 13 tips for being a good tour guide: be responsible; convey a theme; make connections; know your visitors; engage all the senses; ask questions; share personal stories; be honest; be on time; make eye contact and be friendly; make guests comfortable and pay attention: walk at a reasonable speed; and use sub-guides effectively (AJC and Ecologic, 2020).

Guided tour at Shiraito waterfall in Shizuoka, Japan

Sustainable tourism supports the growth of the tourism industry and societies in a sustainable manner while maintaining healthy ecosystems and cultural conditions. The goals of sustainable tourism may well be attained through tour guiding with the use of interpretation. Interpretation does not merely provide information but helps develop an understanding and appreciation of resources and help manage tourists' impact on resources.

According to the World Tourism Organization (2008), "interpretation of the natural surroundings, local culture, and cultural heritage should be provided to customers, as well as explaining appropriate behaviour while visiting natural areas, living cultures, and cultural heritage sites". Interpretation, education and information are needed for both the tourists and the staff working in sustainable tourism. Therefore, interpretation and interpretive guides play an indispensable role in developing and promoting sustainable tourism.

Definition of Interpretation

The first author to mention interpretation was Freeman Tilden, a journalist, playwright, and philosopher, for the United States National Park Service. With a deep understanding of how people communicate, he was able to define interpretation and identify the classical principles of interpretation in his book, *Interpreting Our Heritage*. According to Tilden (1957, p. 8), interpretation is

> *an educational activity which aims to reveal meanings and relationships through the use of original objects, by firsthand experience, and by illustrative media, rather than simply to communicate factual information.*

He viewed interpretation as a communication approach in which the chief aim is to construct meanings and reveal relationships for visitors, rather than transforming isolated facts and information.

The United States-based National Association for Interpretation (NAI), which is the largest international organization of interpretation, advances Tilden's definition. The NAI views interpretation as follows:

> *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.*

The NAI places an emphasis on making connections with the audience. As this definition suggests, one of the most important outcomes of interpretation is connections. The NAI defines a link between the role of interpretation and the missions of organizations that provide interpretation. Its definition clarifies the function that interpretation can play in an organization.

Guided tour at a morning market in Luang Prabang, Lao People's Democratic Republic

Why Interpretation?

Interpretation can contribute to the promotion of the proper usage of the resource and area that audiences are experiencing, especially at those locations where the improper behaviour of audiences has been known to cause problems, including damages to tourism resources. If interpretation is conducted successfully, it can make a difference in the minds of the audience as well as in the management of the site. An applied communication researcher and author of two masterpieces of interpretation, Sam H. Ham (2013), articulates rationales for providing interpretation in *Interpretation – Making a Difference on Purpose*. Interpretation can and should make a difference in three ways:

1. Interpretation can enhance audience experiences.
2. Interpretation can impact attitudes toward and promote appreciation of a place, thing, or concept.
3. Interpretation can strengthen protection of important, rare, or fragile resources by influencing how audiences behave with respect to them.

When people are able to think about and make their own connections to the thing that is being interpreted, their experience is enhanced. Those people are inclined to appreciate what was interpreted. And when they have an appreciative attitude toward the thing being interpreted, they are likely to act toward it in a respectful or protective way. In these ways, interpretation can make a difference in the mind of the audience, and consequently, on the thing (resource) that was interpreted. For this to take place, interpretation has to be conducted in a way that is, for example, qualified in terms of principles, qualities and guidelines (box 2).

Box 2. Principles, qualities and guidelines of interpretation

Six Principles of Interpretation

Having observed, experienced and investigated a number of interpretive activities in the United States National Parks (Appendix A), Freeman Tilden (1957) identified six principles that should be the basis for how interpreters do a good job in interpreting heritage.

1. 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.
2. Information, as such, is not interpretation; however, all interpretation includes information.. Interpretation is revelation based on information.
3. Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable.
4. The chief aim of interpretation is not instruction, but provocation.
5. Interpretation should aim to present a whole rather than a part, and must address itself to the whole person rather than any phase.
6. Interpretation addressed to children should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. At its best it requires a separate program.

Four Qualities of Interpretive Approach to Communication

Based on a large volume of research on how people respond to communication when it is conducted well, Sam Ham (2013) identified four qualities that can make interpretation successful, in *Interpretation – Making a Difference on Purpose*. Interpreters can understand and apply these qualities to be successful.

1. Interpretation has a theme (T).
2. Interpretation is organized (O).
3. Interpretation is relevant (R).
4. Interpretation is enjoyable (E).

Communication is successful when it can attract and hold an audience's attention long enough to make a point and then make the point in a compelling way.

15 Guiding Principles for Interpreting Nature and Culture

Larry Beck and Ted Cable were university professors in the United States and authors of multiple books on interpretation. They expanded the work of Enos Mills and Freeman Tilden, who were among the first to define interpretation, and offered a set of interpretive principles in *Interpretation for the 21st Century - Fifteen Guiding Principles for Interpreting Nature and Culture* (2011). Rooted in seminal literature, Beck and Cable elaborated an interpretive philosophy and listed 15 principles that reflect modern changes in interpretive communication techniques to guide nature and culture interpreters. The principles include the authors' thoughts, views, and guiding philosophies about the act and process of interpretation.

1. To spark an interest, interpreters must relate the subject to the lives of their audience.
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 constitute 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. Technology can reveal the world in exciting new ways. However, incorporating this technology into the interpretive program must be done with foresight and thoughtful 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 must be continually developed over time.
11. Interpretive writing should address what readers would like to know, with the authority of wisdom and accompanying humility and care.
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. It should provide spiritual uplift and 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 it.

Roles of Interpretive Guiding in Sustainable Tourism

Tour guiding offers a variety of potential benefits to sustainable tourism, such as recreation, education, management, conservation, and economic activity. Interpretive facilities and publications are designed with at least one of four purposes: (1) to increase visitors' awareness about a resource or attraction; (2) to alter the behaviour patterns of visitors and residents; (3) to explain community, organization, or agency goals and objectives to visitors and residents; and (4) to orient visitors to the area (Eagles, Browman & Tao, 2001). Researchers have reported the accomplishment of these purposes in sustainable tourism through interpretation or educational programs (for example, Black & Ham, 2005; Eagles et al., 2002; Zeppel, 2008).

Guides play a role in creating a balance between meeting the needs of their employers and land managers and meeting the needs of tourists, operators, host communities and protected area managers (Weiler & Ham, 2002). "Interpretive guiding is the application of the principles of sustainable tourism and interpretation to leading tour groups and managing the visitor's experience" (p. 54). Tour guiding plays a vital role in establishing a link between tourists and places in sustainable tourism; it strives to create intellectual, emotional, and spiritual connections between tourists and the place they are visiting.

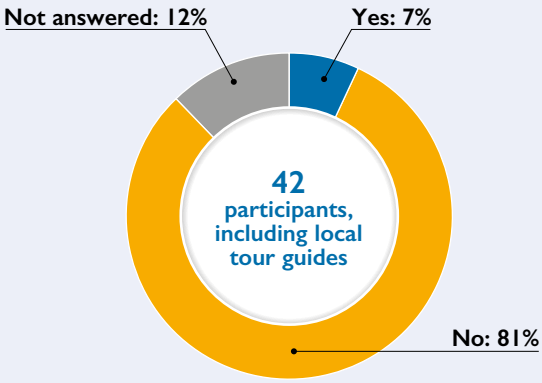
The AJC has undertaken interpretation training for professional guides in ASEAN with a belief that interpretation techniques and knowledge can be learned through hands-on practice in addition to class-room trainings and workshops. Trainings have been organized in Shizuoka (Japan) on 1–5 November 2018 with a follow-up training in Luang Prabang (Lao People's Democratic Republic) on 27 February–1 March 2019, and in Bagan (Myanmar) on 9–12 February 2020. The AJC continues to organize trainings in other cities of ASEAN. These training programs have a common objective: to enhance the capacities of managers and government officers at ASEAN heritage sites, with a view to improving the sustainability of the tourism sites and visitor services and to raise public awareness of conservation of tourism resources. In both Myanmar and the Lao People's Democratic Republic, as well as other ASEAN countries, few guides know and can use interpretation techniques in their daily guided tours. The majority of ASEAN participants in these training sessions (11 in Luang Prabang; 17 in Bagan) had not participated in such a training (figure 3) and began to understand interpretation only after the training (figure 4).

While there is lack of evidence in ASEAN that interpretation has increased sustainable tourism, other countries provide some evidence. A study of visitor experiences on wildlife tours in New Zealand found that visitors appreciated interpretation that advocated conservation, raised awareness of environmental issues, and encouraged low impact visitor behaviours on site (Higham & Carr, 2003). In Australia, a study of whale-watching tours found that conservation-related information and actions provided by tour guides contributed significantly to tourists' understanding of conservation messages and their overall satisfaction (Peake, Innes & Dyer, 2009).

Participants of the training program Bagan, Myanmar (February 2020)

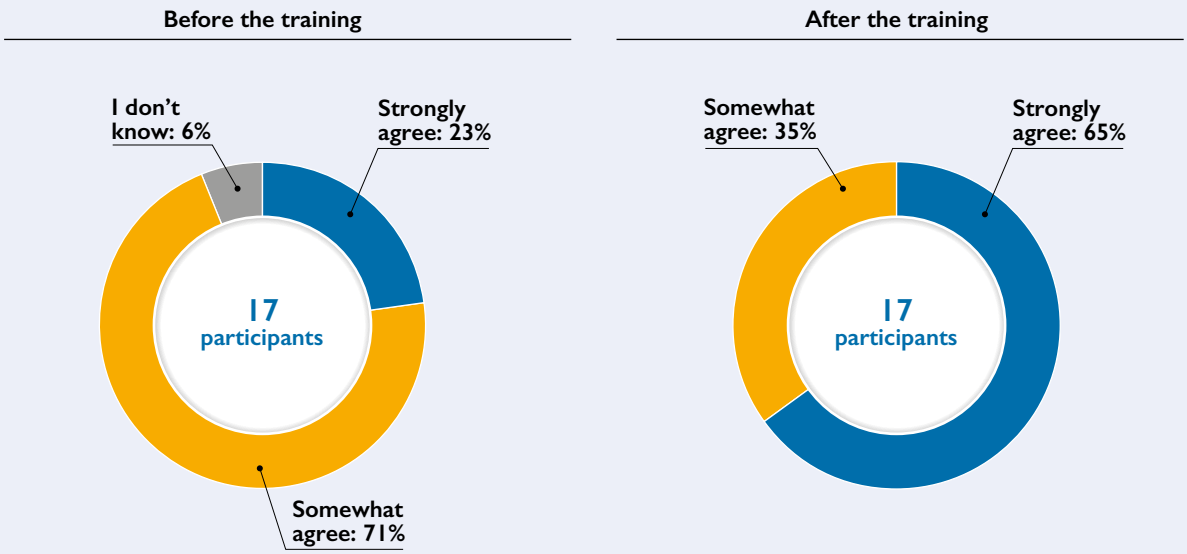
Participants of the training program Luang Prabang, Lao PDR (March, 2019)

Figure 3. Have you participated in the training on interpretation before?



Source: Training Program on Interpretation in Luang Prabang, Lao People's Democratic Republic, 27 February to 1 March 2019, organized by the AJC.
Note: The number of participants was 42, including local tour guides.

Figure 4. I have a clear understanding on interpretation



Source: Training Program on Interpretation in Bagan, Myanmar, 9-12 February 2020, organized by the AJC.
Note: The number of participants was 17.

Through tour guiding, sustainable tourism becomes value added tourism for multiple stakeholders, which makes sustainable tourism stand out among other types of tours. One of the main roles of tour guiding is to add new value to tourism resources and foster appreciation of them. This will lead to site conservation. The ultimate goal of tour guiding is to motivate and enable tourists to exhibit environmentally considerate behaviours.

To do so, the objectives of environmental education (awareness, knowledge, attitudes, skills, and participation) are to be achieved in sustainable tourism. The Sustainable Tourism Promotion Law in Japan describes one role of sustainable tourism as promotion of environmental education. Tour guides are capable of performing such a role.

Guided walk at the Kiyosato Experiential Education Project, Japan

The International Ecotourism Society (undated) advocates taking a particular action on site as a goal of ecotourism in order to minimize impact, build environmental and cultural awareness and respect, and provide positive experiences for both tourists and hosts. Taking an action can increase tourists' satisfaction because most tourists in sustainable tourism intend to be environmentally responsible. Tourists should be encouraged to perform an environmentally considerate behaviour during a sustainable tourism experience.

Demonstration of the effective interpretive guiding at Bagan, Myanmar

II. INTERPRETIVE PLANNING

Interpretive planning is the decision-making process that blends management needs and resource considerations with visitor desire and ability to pay (with time, interest, and/or dollars) to determine the most effective way to communicate the message to the targeted market (Brochu, 2014, p. 3).

Interpretive planning is a strategic process which, in its implementation, achieves management objectives for interpretation and education by facilitating meaningful connections between visitors and park resources (National Park Service, 2000, p. 5).

The development of this workbook was based on the major components of two independent frameworks of interpretive planning: the United States National Park Service's Long-Range Interpretive Plan (National Park Service, 2000) (Appendix B) and the 5-M Models (Brochu, 2014) (Appendix B). The concept, definition, experience, and objectives are all applicable to other tourism assets as well as to places and countries outside the United States, the country where interpretation and its planning are most popular and practiced. The workbook contains the concise but essential components of both frameworks. This workbook is composed of the following sections:

Section 1: Management goals and objectives

Section 2: Significant resource inventory

Section 3: Visitor experience

Section 4: Message elements

Section 5: Visitor profiles

Section 6: Media descriptions

Section 7: Recommendations

Section 8: Evaluation

These sections can be viewed as the five questions – why, what, who, how, and so what – that the interpretation to be offered should answer (figure 5). Although the AJC uses eight components of interpretive planning, there are other ways to organize the elements required for planning interpretive programs. Readers are encouraged to refer to the other planning components identified in Appendix C.

Figure 5. The organization of the workbook

Why	What	Who	How	So What?
1. Management goals and objectives	**2.** Significant resource inventory **3.** Visitor experience **4.** Message elements	**5.** Visitor profiles	**6.** Media descriptions	**8.** Evaluation
	7. Recommendations			

Source: AJC.

WHY

Section 1: Management Goals and Objectives

The mission, goals, and objectives of the agency or organization should be clearly stated and analyzed to determine how the agency's purpose will be reflected through interpretive efforts (Brochu, 2014).

This section addresses the management goals of the agency, organization, or site for which you work.

Goals describe the management's intent in offering interpretive and educational programs and services. They may derive from the agency's strategic plan. This plan may also contain objectives that define specific outcomes for interpretive programs, such as bolstering community support, building future constituencies, and providing opportunities for life-long learning. The mission, vision, goals, and objectives of the agency, organization, or site describe the logic behind the management of a significant heritage site or resource (figure 6).

Figure 6. Logic model of mission, vision, goals, and objectives

Mission

The mission statement is the reason for existence. A mission statement should contain no more than three components: some indication of the target market, the organization's purpose, and the service area. It answers the question, "what do we do and for whom do we do it?"

Sample mission statements

The National Park Service preserves unimpaired the natural and cultural resources and values of the National Park System for the enjoyment, education, and inspiration of this and future generations. The Park Service cooperates with partners to extend the benefits of natural and cultural resource conservation and outdoor recreation throughout this country and the world. (U.S. National Park Service)

We bring the brightest minds together to accelerate environmental literacy and civic engagement through the power of education. (North American Association for Environmental Education)

To stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature, by:

conserving the world's biological diversity
ensuring that the use of renewable natural resources is sustainable
promoting the reduction of pollution and wasteful consumption. (WWF)

Within the framework of ICOMOS International the committee will assist UNESCO in promoting the protection and sound ethical management of underwater cultural heritage. (International Committee on the Underwater Cultural Heritage)

Vision

A vision statement answers the question, "what do we want to be or see five years (or some other point in the future) from now?" It is a future condition.

Sample vision statements

Our vision is to be the world's leading zoo-based conservation organization. (Zoos Victoria)

A powerful force in meeting common global challenges and opportunities. (World Federation of United Nations Associations)

Be, and be recognized as, the best consumer products and services company in the world. (P&G)

A sustainable future for all where environmental and social responsibility drive individual and institutional choices. (North American Association for Environmental Education)

Recognizing the significance of the world's underwater cultural heritage, ICUCH supports awareness of this extremely fragile, finite, and non-renewable resource, which is an important source for the reconstruction and experience of past lifeways. The underwater cultural heritage should be put to good use and it should be protected for the benefit of humanity. (International Committee on the Underwater Cultural Heritage)

Goals

Goals describe ways in which the organization will work toward achieving its mission. They help answer the question, "What does management hope to accomplish?" They make clear how interpretation can make a difference in the management of a site.

Goals help you recognize the wide range of management issues that interpretation can help address. Goals and objectives (discussed next) are the steps that will define success in your business.

Sample goals

Provide opportunities for professional development of individual members. (National Association for Interpretation)

To undertake and promote relevant high-quality zoological and conservation research, to help us achieve our conservation objectives and to inform and influence conservation policy. (Zoological Society of London)

Objectives

Objectives provide details about how goals will be accomplished. Measurability is important in objectives because it provides the key for evaluating the effectiveness of the work done to meet the objectives. Each objective should include both the type and the extent of the outcome expected. There are three types of objectives. Using "if-then statements" may help you to identify these objectives. "If we do this (output), then the likely result will be this (outcome), and if we get that outcome, then the benefit will be (impact)."

A message sign at Kuangsi Waterfall in the Lao People's Democratic Republic

Output (action) objectives measure actions taken by the management agency. They define the steps in implementation and evaluation and should reflect both process (e.g. development time and efforts) and product (e.g. quality, cost) indicators. They articulate what is to be completed in a certain period of time.

Outcome (interpretive) objectives measure observable behaviours or measurable knowledge immediately after delivering a program. They are emotional, cognitive, and behavioural objectives and associated with a specific program, exhibit, or other interpretive element. They address what an individual interpretive program will accomplish.

Impact (administrative or management) objectives are a measurement of the ultimate benefit expected. They align with the mission and goals to indicate how interpretation will be used as a management tool. They can be relatively longer-term.

Sample output (action) objectives

- *Develop and distribute brochures to all tourism agencies in the region.*
- *Provide programs at the park prior to the rainy season.*
- *Design, fabricate, and install exhibits in the visitor center.*

Sample outcome (interpretive) objectives

- *The number of membership of the organization will increase by ten percent in one month.*
- *Eighty percent of the visitors will be able to list two characteristics of this temple.*
- *The number of visitors who step on the sculpture will be decreased by at least 30 percent in six months.*

Sample impact (administrative or management) objectives

- *Funding for the site management will increase annually for the next five years.*
- *The natural environments around the waterfalls will improve annually.*
- *Decreased maintenance costs for repairs to historic structures caused by bad behaviors of visitors.*

Exercise 1.

Management goals and objectives

Decide mission, vision, goals, and objectives of your site.

Mission: . . . . . .

. . . . . .

Vision: . . . . . .

. . . . . .

Goal 1

Impact objectives: . . . . . .

. . . . . .

Outcome objectives: . . . . . .

. . . . . .

Output objectives: . . . . . .

. . . . . .

Goal 2

Impact objectives: . . . . . .

. . . . . .

Outcome objectives: . . . . . .

. . . . . .

Output objectives: . . . . . .

. . . . . .

WHAT

Section 2: Significant Resource Inventory

This section of an interpretive plan states why the site is special and deserves to be protected, managed, and paid special attention to by the management agency and public. It includes a brief narrative of the legislated purpose of the site and a description of its overall significance.

Significance statements describe the importance or distinctiveness of the area. These statements are based on resource inventories. Significance statements may be found in area legislation, legislative histories, scientific and historical studies, or general management or strategic plans. They help determine resource protection priorities, identify primary interpretive themes, and develop desirable visitor experiences. Significance defines the importance of the site's resources as they relate to the purpose of the site or organization.

Sample significance statements

Yosemite National Park is significant because of:

- *Outstanding scenery - including peaks, canyons, cliffs, domes, rivers, immense waterfalls, meadows, wildlife, and forests.*
- *Its unique assemblage of massive granite domes and unique features, which resulted from a rich volcanic and glacial history. Three of the largest exposed granite monoliths in the world are in Yosemite Valley.*
- *Three groves of giant sequoia trees—including the first seen by Euro-Americans and the first to be protected by law.*
- *Its 704,624 acres of wilderness (94.45% of the park). Together with the national forests and other national parks in the Sierra Nevada, Yosemite is part of the second largest contiguous designated wilderness in the lower 48 states.*

(Yosemite National Park Long-Range Interpretive Plan, p. 25)

- *Unique to this vast, contiguous expanse of parkland is an assemblage of striking geologic features, such as multiple and varying rock layers, arches, cliffs, canyons, towers, spires, and other formations.*
- *The park provides incomparable opportunities to view this colorful, geologically significant wilderness from various perspectives.*
- *The park's backcountry regions provide opportunities to experience various degrees of solitude, connection to wilderness resources, and personal challenge.*
- *The park preserves an intact remnant of the Colorado Plateau's high desert ecosystem.*
- *The park contains evidence of prehistoric and historic cultures and conditions of existence, including world-class archaeological sites and properties listed on the National Register of Historic Places.*

(Canyonlands Long-Range Interpretive Plan, p. 9)

When describing the importance or distinctiveness of the site, think about

- What makes the site different from other sites?
- What is outstanding at the site?
- Why does the site need to be protected or optimally managed?

These descriptions will show the fundamental resources at the site and be a focus of your interpretation. They are the drivers of your interpretation. Your interpretation should communicate one or more of these site significances with visitors.

Significance statements are developed on the basis of resource inventories. Resource inventories list primary and other resources that exist at the site. This section of the interpretive plan describes significant site resources, ways of experiencing those resources, and associated interpretive stories.

Resource descriptions are resource assessments. They include not only a list of resources on site but also a summary of the current condition of these resources. For example, they can include what is known about the condition of the site and regional ecosystems, habitats, species, and cultural, social, and recreational resources. Resource conditions can then be related to visitor experiences.

Three aspects of resources should be considered:

- What are the *primary resources* – and the stories and values associated with them – that we want to interpret, provide access to, and protect? What are the characteristics, conditions, changes, influences, and relationships?
- What are the *visitor behaviours* that affect these resources, how do they affect them, and how can we influence those behaviours to help meet our mission and achieve our goals?
- What are desired *future resource conditions?*

Sufficient knowledge of the **current conditions of important resources** needs to be obtained. It is necessary to know the resources that make the area significant and attractive. These resources include visitors' concerns such as visitor safety and security.

Knowledge of **the desired resource conditions** needs to be gained. It may come from other sources, such as resource management plans, or from consulting with resource specialists.

A description of **resource-related visitor behaviour** must be articulated. It describes how interpretation and the visitor experience are involved in getting from *the current conditions to the future desired conditions.* Visitors impact natural and cultural resources in many ways both positively and negatively. The interpretive plan should include a description of how visitors can be involved in meeting resource goals.

As natural and cultural resources become rarer and gain a need for protection, all three aspects of resource planning are important.

Exercise 2.

Significant resource inventory

Describe resources of your site.

Primary resource	Associated stories and values	Current conditions	Visitor behaviours affecting the resource	Desired future resource conditions

WHAT

Section 3: Visitor Experience

This section of the interpretive plan presents a brief narrative of the desired visitor experience at the site. It identifies the important experiences that should be available to visitors at the site. Important visitor experiences may deal with emotions, cognition, behaviours, and senses.

The description defines how the interpretation provided will facilitate an emotional, intellectual, and physical experience based on the mission, goals, and significance of the site. It suggests how interpretation may change the way the public will feel, think, or act, as a result of the site experience. It describes the desired visitor experience, both the currently available experience and the opportunity desired for future visitors.

Workshop at a lacquerware shop in Bagan, Myanmar.
Photo by Ecologic.

The exercise of this section asks to:

- List the important experiences that should be available to visitors; and
- Describe the opportunities available for visitors to derive meaning and value from resources and experiences at the site.

Traditional Lao cooking class in Luang Prabang, Lao PDR

Sample visitor experience

Visitors to Zion National Park will:

- *be provided with excellent customer service and high-quality visitor experiences.*
- *be provided with opportunities to understand and appreciate park resources.*
- *be educated about the importance of preserving park resources.*
- *benefit from park efforts to reach out to diverse and underrepresented audiences.*

(Zion National Park Long-Range Interpretive Plan, p. 9)

Visitors will have access to interpretive facilities, media, and services that will:

- *Help them meet their personal goals in visiting Canyonlands NP.*
- *Increase their awareness of the experiences and opportunities available to them.*
- *Inform them of methods, locations, and opportunities to experience solitude, natural sounds, long-range views, and a feeling of wilderness.*

Visitors will receive accurate and consistent information from a variety of sources, including all park staff, partners, outfitters, concessioners, and Internet sites.

(Canyonlands Long-Range Interpretive Plan, p. 9)

A tour guide explaining the vegetation at the Kuangsi Waterfall, Lao People's Democratic Republic.

Exercise 3.

Visitor experience

What are the important emotional, intellectual, and physical experiences that should be available to visitors on site?

How do you want the visitors to feel on site?

. . . . . .

. . . . . .

. . . . . .

How do you want the visitors to think or learn on site?

. . . . . .

. . . . . .

. . . . . .

How do you want the visitors to behave on site?

. . . . . .

. . . . . .

. . . . . .

In order to realize the experiences described above, what opportunities should be available for visitors on site?

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. . . . . .

WHAT

Section 4: Message Elements

Message = Theme ≠ Topic

This section of the interpretive plan presents messages about the most important ideas or concepts about the site.

Communicating messages that connect the visitor to the resource is what interpretation is all about. The most appropriate messages can be determined for a particular site based on three questions:

- What are the most significant natural and cultural heritage stories?
- What are visitors most interested in?
- What does management need to communicate?

These messages are statements that describe themes. Themes are the building blocks on which interpretive services and educational programs are based. Theme statements convey to the public the meanings and universal concepts inherent in the site's resources. Theme statements connect tangible site resources to larger intangible processes, systems, ideas, and values. They should be expressed clearly and may be divided into primary and secondary statements.

Themes help to explain why a site story is relevant to people who may otherwise be unaware of connections they have to an event, time, or place associated with the site.

A theme is different from a topic. A theme summarizes ideas, concepts, and stories that are central to the nature and significance of the site. A theme is described in a complete sentence, whereas a topic produces a number and range of themes.

A message sign in Luang Prabang, Lao People's Democratic Republic

In this section of the plan, you should

- Identify the interpretive value of the site – why it is important enough to allocate resources to its interpretation.
- Try to answer the question, "What do I want people to understand when they leave here?"
- Present messages that are easy to understand and interesting.
- Make sure each message connects tangible objects to intangible ideas or incorporates universal concepts that will help people make emotional and intellectual connections.
- Think about what will be useful and meaningful to the audience, not about what you want to say.

A theme sometimes can involve multiple subthemes. Subthemes are sometimes called message elements and can overlap each other. One subtheme leads to the next subtheme and functions like a transition. Each subtheme has a story and together they tie everything up in a larger story.

Sample topics

Birds, photosynthesis, architecture, history of modern art, indigenous people, characteristics of classical music, each of which generates a host of themes.

Sample theme statements

The geologic features of Zion National Park, including the premier exposure of Navajo sandstone, the brilliantly colored rock layers, and Zion's place in the Grand Staircase, are both scientifically significant and allow us to immerse ourselves within their immense scope of size and time.

Located at the convergence of three ecoregions, Zion National Park contains a richness and diversity of flora and fauna that belies the park's extreme topography and arid conditions.

Zion National Park is the setting for a legacy of generations of people, all of whom lived their lives deeply connected to this landscape.

(Zion National Park Long-Range Interpretive Plan, pp. 7-8)

Sample theme and subtheme statements

Theme: *Prescott, a classic River Town and gateway to the Great River Road, is a gathering place where rivers, wildlife, and people blend into a dynamic living community rich in history and grand scenery.*

Subtheme: *The Mississippi River has nurtured prehistoric and historic cultures. As rivers have influenced people, people have influenced the rivers.*

(Freedom Park Great River Road Visitor Center, pp. 41, 52, 54, and 58)

Theme: *Rib Mountain looms over the surrounding landscape, offering panoramic views and opportunities for people to connect with the natural features and human history of this unique place.*

Subtheme: *Rib Mountain, the third highest elevation in Wisconsin, has been a significant landmark for centuries and now attracts thousands of people each year to enjoy the spectacular view and recreation opportunities.*

Subtheme: *Rib Mountain is home to diverse wildlife and plant species, most typical of northern mesic forests, and others unique to the quartzite talus and quarry bluffs.*

(Rib Mountain State Park: Interpretive master plan, pp. 26 and 29)

Exercise 4.

Message elements

Describe a topic and the themes of your site.

Topic:

. . . . . .

Theme statement 1:

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. . . . . .

. . . . . .

Subtheme statement 1 (if any):

. . . . . .

Subtheme statement 2 (if any):

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Theme statement 2:

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. . . . . .

Subtheme statement 1 (if any):

. . . . . .

Subtheme statement 2 (if any):

. . . . . .

WHO

Section 5: Visitor Profiles

A visitor profile is a broad description of visitors at a site and their needs. It includes both actual and potential audiences. It should include on-site, off-site and outreach audiences. When possible, this analysis should be made from systematic surveys of visitors and potential visitors.

Planning for visitors includes identifying audience segments, considering motivations and expectations, and projecting and predicting trends. Although visitors are individuals, describing major visitor groups yields approximations that can be useful for planning. Targeting groups, such as school students, families, day users, or overnight tourists allows you to better identify and serve primary audiences.

It is also important to identify those who are not coming to the site and to know the reason why they do not come to visit the site. Non-visitors may have encountered issues of accessibility or opportunity. In the planning, ways to reach out to previously uninvolved audiences may be considered.

Visitors differ in many ways: age, gender, ethnic backgrounds, expectations, types of group, frequency of visits, socioeconomic status, education and knowledge. Not all differences are significant or need to be considered.

Foreign visitors wearing traditional dress and visiting a shrine in Shizuoka, Japan

In your interpretive plan, think about answers to the following questions about visitors:

- How many people visit the area and with what frequency (daily, weekly, monthly, seasonally, yearly)?
- How long do they stay?
- Where do they come from?
- Why do they come? What are they interested in?
- What do they expect from their visit?
- What do they know about your area, resources, stories, regulations or opportunities?
- How accessible is your area to different populations of potential visitors?
- How do different groups feel about visiting your area?
- Who is not coming, and why?
- How do visitors feel and what do they think about your resources, experiences, facilities and staff?

Regarding information about visitors, there are many practical questions to consider:

- What information do we need about visitors?
- Which information is the most important?
- Why do we need it (how will it be used)?
- How accurate does it need to be?

Sample visitor profiles

53% were in families, with 59% of those in groups of two.
36% of visitors were 26-40 years old and 29% were over 55 years of age.
Most (65%) were first-time visitors.
Foreign visitors constituted 11% of total visitation.
They commonly came from Germany, Canada and Switzerland.
Americans came from Colorado (29%), California (15%), Utah (11%) and other states.

(Canyonlands Long-Range Interpretive Plan, p. 19)

Most visitors only spend a few hours or a day in Zion. They tend to stay in Zion Canyon or only visit Kolob Canyons. They will typically be interested in completing one or two popular day hikes in addition to doing some sightseeing along the scenic drive. These visitors need orientation, trip planning assistance and information about hiking options. Some obtain this information before arriving (via the park website, or independent websites and guidebooks), while almost one third of our visitors seek this information at the contact stations once they are here.

Repeat visitors and those that spend a few days in Zion will be able to have a more complete experience and may seek opportunities for adventure, enjoy in-depth ranger-led programs and be interested in exploring other sections of the park outside of the main canyon. Many also find their favorite spots and enjoy sharing those places with others they know, acting as informal tour guides.

(Zion National Park Long-Range Interpretive Plan, p. 12)

Most visitors to Zion Canyon only visit the main canyon, except for perhaps driving the Zion-Mount Carmel Highway, which runs alongside designated wilderness on the park's east side. During the spring, summer and fall, use of the shuttle system is mandatory except for tour buses and lodge guests. They may drive to Zion Lodge, located approximately halfway up the Zion Scenic Drive.

(Zion National Park Long-Range Interpretive Plan, p. 17)

Exercise 5.

Visitor profiles

Describe visitor profiles of your site.

Visitor type	Characteristic	Currently offered interpretation
Current visitors		
Non-visitors		
Future visitors		

Exercise 5.

Visitor profiles

What information do we need about visitors?	Which information is the most important?	Why do we need it (how will it be used)?	How accurate does it need to be?	How will we get that information?

HOW

Section 6: Media Descriptions

This section reviews media that you can use to communicate with visitors at or outside of a site.

Audio guide at the Tokyo Metropolitan Edo-Tokyo Museum, Japan

Media is anything that helps to communicate a message. Common types of media used to deliver interpretive messages include audiovisual products, museum exhibits, wayside exhibits, publications and personal services. Each has qualities that make it more or less suitable for a given application. In interpretive planning, specific media and messages should be identified for addressing targeted market segments.

In selecting media for communicating a particular message, you should consider the message, the visitor (user) and your resources. What is to be communicated influences the way to communicate, and vice-versa. Visitors (users) must be able to access and comprehend the information presented. The quality and quantity of resources available to support media development, such as money, time, skill and efforts, will also influence the kind of media selected. Personal services, non-personal services and existing media conditions should all be assessed when selecting the media.

The *personal services* section describes the role that personal services play in providing meaning to the overall visitor experience. They include guided tours, living history displays, live performances, talks, presentations, workshops, and any communications at an information counter and at exhibits. These services are also relevant for off-site activities. The potential use of facilities or media should be explored for the personal services.

The *non-personal services* section assesses the need for interpretive media that include exhibits; wayside signage; publications; audiovisual programs; applications for smartphones, tablets and computers; websites; mass media; study guides and guidebooks. Media should address multiple points of view to meet the needs of diverse audiences, and assessments should be made accordingly. The location of use or distribution of non-personal media should be evaluated.

Existing conditions of interpretive media should be examined and briefly summarized. This summary provides a point of departure for planning their future development.

Guided walk on Mount Fuji in Shizuoka, Japan

Sample media conditions

Off-site Programs and Services

Community outreach programs are an important component of the Canyonlands interpretive program and are offered year-round. Activities include presentations at agency and community organization meetings, senior citizen and community centers, and staffing a booth at county fairs.

Canyonlands National Park Web Site

<www.nps.gov/cany > Overall this is a high-quality and valuable website, and is frequently used by the public. Information is now more accessible and consistent than in the past. Reservations cannot be made online due to security issues.

Newspapers: Canyonlands Trip Planner, Canyonlands Park Guide Newspaper

Unigrid Park Brochures: Canyonlands National Park (translations available in French, Spanish, German and Italian)

Self-guiding Trails

Trail brochures currently sell for a nominal donation at trailheads and in the visitor center. Two are available: Mesa Arch (desert ecology) and Neck Springs (desert ecology).

A self-guiding auto tour booklet for the Island in the Sky is also available from the cooperating association.

(Canyonlands Long-Range Interpretive Plan, pp. 20-22)

Sample personal services

Most of the park's personal services occur in Zion Canyon. Rangers present talks on aspects of geology, history and wildlife on the patio behind the Zion Human History Museum. They lead hikes and history walks, give shuttle tours and evening programs, and set up tables and props for drop-in programs along trails or at viewpoints. With recent staffing cuts, the interpretive staff has reduced the number of ranger-led hikes and increased the number of drop-in programs, where they might be able to contact upwards of 500 visitors in a span of a few hours.

Sample non-personal services

There is a wide variety of non-personal services within Zion Canyon. With 75 percent of park visitors using the shuttle to experience the park, the shuttle narration is one of the most influential on-site non-personal services in Zion Canyon. The interpretive narration is continuous from the Zion Canyon Visitor Center to the Temple of Sinawava. It covers a wide variety of topics, including geology, human history and recreational opportunities.

(Zion National Park Long-Range Interpretive Plan, pp. 18-19)

Each kind of media has its own strengths and limitations. Harpers Ferry Center (1998, pp. 33-39) delineates them as listed in tables 2-7.

Table 2. Advantages and limitations of media: Personal services

Advantages	Limitations
Can be more enjoyable for vistors to experience direct, person-to-person communication rather than impersonal media	Requires well-trained interpreters
Are easy to customize to meet visitor needs or changing conditions	May not deliver consistent messages
Can draw on group or visitor reactions to stimulate interest	Requires close supervision and management
Can be interactive	Can be difficult and expensive to maintain year-round
May be monitored and changed as needed	Has high recurring costs
Taps diverse skills of interpreters	Can be difficult to critique properly
Versatile, effective and relatively easy to implement	
Can be cost-effective, especially in the short term	
Can convey complex messages, and help visitors connect tangibles and intangibles to universal concepts	

Visitor information counter service at the Kiyosato Experiential Education Project, Japan

Table 3. Advantages and limitations of media: Non-personal services, audiovisual media

Advantages	Limitations
Are well suited to presentation of chronological and sequential material	Cannot be used everywhere
Can capture realism and deliver emotional impact	Require back-up equipment, periodic maintenance and regular monitoring
Provide opportunities for dramatization	May be perceived as sterile or impersonal
Can be portable, for off-site use	May offer little opportunity for visitors to browse or study an item in depth or at their own pace
Can provide views of places, animals, plants and seasons otherwise unavailable or inaccessible	Can annoy staff at visitor centers with repetitive soundtracks
Can create a mood or atmosphere	May be a visual or auditory intrusion
Can reach many visitors at one time	Can have expensive production and maintenance costs
Can be adapted to serve physically impaired visitors	May fall short of expectations if low-budget product, as people usually have high expectations of audiovisual media
Can illustrate before-and-after effects	
Can be produced in different languages	

Video guide at the Kanazawa Castle Park, Japan

Table 4. Advantages and limitations of media: Non-personal services, historic furnishings

Advantages	Limitations
Allow visitors to go inside historic spaces	Are expensive to maintain due to security, housekeeping and conservation costs
Help visitors feel places "come alive" as they are surrounded by historic artifacts and relate more directly to historic events and personalities commemorated by parks	May be difficult for visitors in wheelchairs to access, and light levels may be low for visually impaired visitors
Offers opportunities for researchers to unearth archival resources, make new contacts or discover previously unknown artifacts that add to the site's interpretation	Usually require some additional interpretation (e.g. tour guides, interpretive panels, audio stations)
Helps visitors develop a visual vocabulary of material culture and decorative arts through experiencing an accurately reproduced, historically furnished room	Require barriers that can block sight lines or seem obstructive, but are necessary if space is not restricted to visitors on guided tours

Replica of a dining room in a historical house at Foot Soldier House, Japan

Table 5. Advantages and limitations of media: Non-personal services, museum exhibits

Advantages	Limitations
Can be viewed at visitors' own paces	Are ensitive to agents of deterioration
Can be designed in all shapes, sizes, colors and textures	Require security and maintenance
Can display objects associated with the site	Must be housed in adequate facilities
Can incorporate artifacts, artwork or mixed media to produce desired atmosphere and effects	Do not work well to tell largely verbal, complex or sequential stories
Can transcend language and cultural barriers	May have high commercial value, making them targets for theft
Can promote the use of the senses to aid the perception of able-bodied and disabled visitors alike	Can be very expensive
Can promote visitor participation	May look amateurish and are usually less effective if inexpensive productions are used rather than higher-quality (and more expensive) productions
Can be designed for both indoor and outdoor use	Can overwhelm the message with technology and materials
Are well suited for information that can be illustrated graphically	
Can group permanent exhibits with rotating, seasonal or temporary displays to provide a sense of change	
Can provide experiences of varying complexity, allowing visitors to select the depth they like	

A diorama of an old town at the Tokyo Metropolitan Edo-Tokyo Museum, Japan

Hands-on exhibit at the Tokyo Metropolitan Edo-Tokyo Museum, Japan

Table 6. Advantages and limitations of media: Non-personal services, publications

Advantages	Limitations
Are portable	Can discourage potential readers with lengthy or complex texts
Can treat a subject in-depth	Can be a source of litter
Provide detailed reference information	Require periodic revision to remain current and accurate
Can be produced in different languages	May require facilities and maintenance (such as brochure dispensers)
Are suited to presenting sequential or complex material	
Can be read at visitors' own paces	
Can produce income	
Can often be revised at a reasonable cost	
Can be produced at various levels of detail	
Have value as a souvenir	
Can be used before going to a site, during the visit or after returning home	
Can be produced to treat the same subject for different audiences	
May be appropriate for stories lacking in artifacts or photographs	

Brochures and booklets of Luang Prabang, Lao People's Democratic Republic

Table 7. Advantages and limitations of media: Non-personal services, wayside exhibits

Advantages	Limitations
Can be available 24 hours a day	Accommodate a limited amount of text and graphics per panel
Use real objects and features in their own sites as objects of interpretation	Do not work well for complicated subject matter
Are relatively inexpensive	Focus attention on tangible resources; less effective with intangibles and universal concepts
Can be designed to blend with site environment	May intrude on a park's visual landscape
Provide onsite interpretation of specific sites and stories	May not be practical at sites with climatic or environmental extremes
Can depict a place as it appeared many years before	Are susceptible to vandalism
Can show a feature from a view unattainable by visitors	
Can illustrate phenomena that are invisibly affecting a resource	
Establish a park identity at remote, unstaffed locations	
Alert visitors to safety or resource management issues at the point of danger, decision, or environmental impact	
Can be replaced relatively quickly and inexpensively	

Wayside sign at Tat Kuang Si Bear Rescue Centre, Lao People's Democratic Republic

Wayside sign at the Kanazawa Castle Park, Japan

Exercise 6.

Media

How do you use media for interpretation?

Current media

Medium type	Current state of media (purpose, topics, location, usage volume, etc.)

Future media to be used

Medium	Message	Visitors	Resource

WHY, WHAT, WHO, HOW

Section 7. Recommendations

This section should list suggested actions to be taken over the next few or several years at a site in regard to interpretation and visitor services.

The suggested actions derive from the interpretive planning process. They describe the means to meet the management goals through interpretation. They offer a guideline on the design and implementation of individual interpretive programs. These suggestions may involve not only actions for interpretation, but also for education and visitor services in and outside of the site.

An interpretive plan is a middle-range plan – three to five or ten years. Conditions and priorities may change during such a period, and the suggested means may need to be modified. The modified means should continue to align with the management mission and goals.

The suggested actions are a chief product of the interpretive planning and part of the planning cycle (figure 2). They are the recommendations of an interpretive plan. According to the recommendations, an implementation plan should be developed further or improved in order to put the plan into practice. An implementation plan describes when the suggested actions will take place, and possibly with whom to take such actions.

Sample recommendations

- *Continue to work with nearby parks to develop a Learning Center for ecological research and education.*
- *Periodically review interpretation and education to ensure factual and balanced presentations that include multiple perspectives where appropriate and significant. Examples include interpretation of mining and ranching.*
- *Develop a new brochure for Mesa Arch. It would have a desert ecology theme.*
- *Install wayside exhibits at two pull-offs (Orange Cliffs and Candlestick Tower) on the way to Grandview; one would interpret primary geological features visible from the site and one would interpret wilderness values.*
- *Revise the content of the wayside exhibit at Buck Canyon Overlook to be less judgmental about past human activities (mining and ranching). Correct inaccuracies on other waysides in the district.*
- *Eliminate the Neck Spring trail guide. Produce a trail guide for Murphy Point. The main topic would be cultural history.*

(Canyonlands Long-Range Interpretive Plan, p. 27)

Exercise 7.

Recommendation of a combination of themes, target visitors, and media

Themes (messages)	Target visitors	Media

SO WHAT

Section 8: Evaluation

Evaluation is an essential part of planning for continued improvement. It asks whether goals were met. It answers questions such as, "How well has the interpretive program worked?" and "How do visitors evaluate their experiences here?"

Evaluation can also identify and quantify both causes and results. Like most other aspects of planning, evaluation should be an ongoing process, the form of which is tailored to the tasks and questions to be answered. Through evaluations, alternative means to improve the current conditions can be identified, if there are any problems. Such recommendations may address management goals, visitor experiences or interpretive themes, media and programs.

The purpose of evaluation varies depending on the situation. It serves these purposes:

1. Provide accountability
2. Assess performance of individuals
3. Assess economic efficiency
4. Determine reasons why a program is or is not effective
5. Measure impacts or outcomes

Corresponding to these purposes, several types of assessments of interpretation exist:

1. Needs assessment
2. Program conceptualization and design assessment
3. Efficiency assessment
4. Program process assessment
5. Impact assessment

The timing of evaluations also varies with the purpose (figure 7). Evaluations can take place before developing or delivering an interpretive program, during delivery of a program and after completing a program. Needs assessments and program conceptualization and design assessments are performed *before* program delivery. Process assessments take place *during* delivery of a program. Impact assessments typically occur *after* completing a program. Efficiency assessments can be performed at any time.

Figure 7. Types, purpose and timing of assessment

Type of evaluation	Purpose	Before	During	After
Needs assessment	Determining whether there is a need for an interpretive product or program and what product or program is most appropriate to meet the need	●		
Program conceptualization and design assessment	Examining whether the program's structure, functions and procedures are appropriate for attaining its objectives	●		
Efficiency assessment	Determining the degree to which an interpretive product or program produces benefits in relation to cost, using cost-benefit and/or cost-effectiveness analysis	●	●	●
Program process assessment	Monitoring how well the program is being conducted: whether a program is reaching target audiences; whether it is being conducted as designed; and whether resources are being expended in the proper way in conducting the program		●	
Impact assessment	Measuring impacts or outcomes – positive and negative, intended and unintended – in terms of visitor experience, resource protection and visitor management/protection		●	●

Source: AJC.

Needs assessments determine whether there is a need for an interpretive program and what is the most appropriate program for meeting the need. They help decide whether an interpretive program should be offered or not. They help provide accountability. They occur in the earliest stage of the evaluation before starting to design an interpretive program.

Program conceptualization and design assessments examine the adequacy of the message, the interpretive program's organization, and the media to be used in a program. They help produce effective interpretation before investing a lot of time, money, and staff efforts. These evaluations can help minimize the gap between what interpretation will be and what it should be. Front-end evaluations take place to learn about target audiences, such as their interests, prior knowledge and experience, and needs; they are essential when little information about such visitors is available. Formative evaluations assess the adequacy of the planed activity and sometimes include mock-ups to test whether the intended activity works as it was designed. Program conceptualization and design assessment is performed while planning and designing a program. They help minimize the gap between what an activity will be and what it should be.

Efficiency assessments determine program cost and cost-effectiveness. They assess the degree to which an interpretive program produces benefits in relation to cost, using cost-benefit and/or cost-effectiveness analysis. They can compare the program and its costs with others with similar goals to evaluate the program's cost-effectiveness.

Program process assessments take place during program implementation. They can examine how well the program is being conducted: whether it is reaching target audiences, whether it is being conducted as designed and whether resources are being expended properly. This type of evaluation includes actual audiences.

Impact assessments usually occur after implementing programs. They examine program impacts or outcomes in terms of audience experience, resource protection and site management. Impact assessments can measure both positive and negative impacts and both intended and unintended impacts.

Depending on the type of evaluation, various techniques are available to carry it out. Examples include observations of visitors, observations of behavioural traces, questionnaires, formal interviews, informal interviews, group interviews, meaning mappings, self-testing devices, and others.

There are a variety of techniques of evaluation:

- Observations of audiences
- Observations of behavioural traces
- Questionnaires
- Formal interviews
- Informal interviews
- Group interviews
- Meaning mappings
- Self-testing devices

These techniques are able to produce reasonably scientifically adequate outcomes. They require relatively little systematic design and adaptation, which may require knowledge and skills. Some "casual" and informal techniques are also available for use:

- Comment forms
- Comment books or visitor registers
- Interviews or talks
- Letters
- Personal contacts
- Suggestion boxes
- Visitor surveys

Suitable techniques should be selected on the basis of the purpose of and available resources for the evaluation.

Exercise 8.

Evaluation

What do you want to do with evaluation?

Think about the purpose, method, and timing of evaluations that you want to conduct.

What do you want to know? (Purpose)	How do you evaluate? (Evaluation method)	When do you evaluate? (Timing)

APPENDIX

Appendix A.
Comprehensive Interpretive Planning in the related planning system in the United States National Park Service

Elements of the Comprehensive Interpretive Planning Process

A. Long-range Interpretive Plan

1. Background for planning
   a. Purpose and significance
   b. Visitor experience goals
   c. Themes incorporating tangible or intangible meanings, or universal concepts
   d. Assessment of existing interpretive personal services, facilities and media
   e. Conditions
   f. Visitor profiles

2. Interpretive program description
   a. Personal services
   b. Non-personal services or media
   c. Facilities
   d. Orientation and information
   e. Education program
   f. Library and collection needs
   g. Research needs
   h. Partnerships
   i. Staffing needs and costs
   j. Implementation plan

B. Annual Implementation Plan

1. Program status
2. Management issues facing interpretation
3. Annual work plan
4. New individual program plans
5. Status of implementation plan

C. Interpretive databases

1. Annual media inventory
2. Visitor survey data
3. Media evaluation
4. Annual interpretive program report
5. Annual volunteers-in-parks participants
6. Education plan
7. Media plans
8. Basic park reading list
9. Statement for interpretation

Interpretive concept plans

1. Themes for situations linked to overall park themes
2. Visitor experiences for situations
3. Action planning

Participants of an effective planning team should provide multiple perspectives.

A. Who should fill the role of facilitator and why?

Specialists with demonstrated competency to lead interpretive planning include the following:

a. Support office staff

b. Harpers Ferry Center staff

c. Consultants

d. Field personnel

e. Others

B. Who should participate and why?

Representatives from within the National Park Service and outside of it should participate. They may include the following:

1. National Park Service

a. Resource specialists
b. Maintenance workers
c. Concession specialist
d. Managers
e. Staff
f. Front-line interpreters
g. Fee collectors
h. Trail crews
i. Protection rangers
j. Others

2. Non-National Park Service

a. Subject matter experts
b. Academia
c. Ethnic or cultural representatives
d. Park neighbors
e. Business representatives
f. Advocacy representatives
g. Adversaries
h. Partners
i. Cooperating associations
j. Others

Appendix B.
Background for the training framework

U.S. National Park Service's Long-Range Interpretive Plan

The United States National Park Service has developed management policies that address interpretive planning. In the policies, the General Management Plan (GMP) defines desired resource conditions, desired visitor experiences and any necessary development.

The National Park Service adopted a unified planning system for interpretation and education in 1995. It has offered a foundation for the development of the Comprehensive Interpretive Plan (CIP). The CIP provides the detail necessary to put the concepts of the GMP into action.

The CIP includes a tool for making choices. It helps park managers decide what their objectives are, who their audiences are, and what mix of media and personal services should be used. The heart of the CIP is the Long-Range Interpretive Plan (LRIP), whose process also encourages development of targeted, realistic strategies, and actions that work toward achievement of the LRIP goals. The LRIP defines the overall vision and long-term (five to ten years) interpretive goals of the National Parks. It addresses both personal services and media. It is prepared by the park staff and park partners and community representatives, with the aid of a facilitator skilled in interpretive and educational planning.

Brochu's 5-M Model

Brochu (2014) suggests the 5-M model of interpretive planning. In this model, effective interpretive planning that is approached thoughtfully and addresses a wide array of variables should always lead to a significant chance of success because it fully integrates the five "M"s: management, messages, markets, mechanics and media. It forms a planning framework that works whether a project involves a single program, multiple programs or site-wide efforts.

Management: The "nuts and bolts" associated with running the interpretive operation. Includes mission, goals, policies, issues and operational resources such as budget, staffing and maintenance.

Messages: The ideas that will be communicated to the visiting public. Includes themes, subthemes and storylines based on resources, audiences, management and considerations.

Markets: The users and supporters, both current and those who might have an interest in the subject or site in the future; and the implications of targeted market segments, and market position.

Mechanics: The large- and small-scale physical properties that have some effect or influence on what is being planned.

Media: The most effective method(s), given the mechanics of the situation, for communicating messages to targeted market segments in support of management objectives.

Appendix C.
Components of interpretive planning of three organizations

1. Components of interpretive plan of the U.S. National Park Service

Component	Brief description
Purpose	Purpose statements describe why an area was set aside, and what the purposes of the area are today. Legislation, legislative history, public participation, articles of incorporation and agency rulemaking can provide the basis for purpose statements.
Significance	Significance statements describe the importance or distinctiveness of the area. These statements are based on resource inventories but are more than an inventory.
Interpretive themes	Themes are often described as the key stories or concepts that visitors should understand after visiting a park. Themes provide the foundation for all interpretive programs and media developed in a park.
Visitor experience	Visitor experience goals describe opportunities for visitors to derive meanings and values from park resources and experiences. All experiences should relate to park purpose, significance and desired outcomes.
Goals and objectives	Goals are seen as long-range, general descriptions of desired outcomes, whereas objectives are more short-range, measurable and specific outcomes. Objectives are often useful when discussing desired outcomes for specific media, facilities or programs.
Visitors	Planning for visitors includes identifying audience segments, considering motivations and expectations, and projecting and predicting trends. It is also important to identify those who are not coming to the park and ask if they face issues of access or opportunity.
Resources	Most interpretive plans describe significant park resources, ways of experiencing those resources and associated interpretive stories. Resources have three important aspects: the present state of important area resources, the desired resource conditions and resource-related visitor behaviour.
Subject matter knowledge	Interpretation is not just a collection of static facts; rather it seeks to provide visitors with a better appreciation and understanding of resources and experiences. Insuring that interpretation is relevant and contemporary requires frequent reevaluation of facts, identification of new sources, consideration for different points of view and reconsideration of past themes.
Interpretive media	Some of the most important elements in a media decision are message, audience and resources.
Facilities	Before options or solutions are considered, it is especially important to establish the goals and functions, and the criteria for variables such as location and appearance.
Landscapes	Some landscapes are so recognized for having special qualities that their mere mention conjures images in the mind's eye.
Evaluation	Evaluation asks whether goals were met; it can also identify and quantify both causes and results. Interpretive plans usually include evaluations of present conditions. Evaluations done during a process are called formative; evaluations performed at the end of a process are called summative.

Source: Harpers Ferry Center. (1998). Planning for interpretation and visitor experience. Division of Interpretive Planning, Harpers Ferry Center, National Park Service, Harpers Ferry, West Virginia.

2. Components of interpretive plan of National Association for Interpretation

Component	Brief description
Advocacy	Interpretive organizations must have advocates and be advocates for their resources.
Audience analysis	Understanding the audience is critical to the success of the plan.
Civic engagement	Successful interpretive plans usually include stakeholder involvement and/or public input.
Evaluation	Evaluation should be built into the planning process at multiple stages.
Management objectives	Interpretation methods and content should align with management objectives.
Marketing factors	Understanding the market climate and niche can help in achieving success.
Media descriptions	The interpretive plan clearly indicates the mix of media required to convey the message(s) to specific audiences.
Message elements	Message elements include the central theme, subthemes and storylines.
Operational commitment	The best plan cannot be implemented without support.
Partnerships	For cost-effective operations, most interpretive organizations require partners.
Staff/volunteer training	Staff and volunteers are usually responsible for implementing the plan.
Stakeholder involvement	Stakeholders may include partners, volunteers, staff, governance, user groups and others.
Terminology	Consistent vocabulary helps avoid costly misunderstandings.
Visitor experience	Ultimately, the interpretive plan defines the visitor experience.

Source: National Association for Interpretation. (2009). Standards and practices for interpretive planning. https://www.interpnet.com/docs/BP-Planning-Jan09.pdf.

3. Components of interpretive plan of Schmeeckle Reserve Interpreters

Component	Brief description
Mission and goals analysis	Written and unwritten
Visitor studies	Existing studies and information gathered during the process
Tangible resource inventory	Identification of associated intangible meanings
Theme and message development	The big ideas and the stories to tell through interpretation
Conceptual facility development architectural program	Visitor flow, space designation and size, visitor experience, building materials, sustainable features
Conceptual site development	Trail systems, surfaces, roads, parking, landscaping, wayfinding
Interpretive media and program concepts	Purpose, measurable objectives, descriptions, illustrations

Source: Schmeeckle Reserve Interpreters. http://www.uwsp.edu/cnr-ap/schmeeckle/Pages/consulting/master_planning.aspx.

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