Plans are the dreams of the wise.
—German proverb

Planning interpretation defines how to interpret a cultural, historic, or other resource. Planners describe ways to produce rich, memorable experiences for interpretive clients. Plans provide strategies to help interpreters connect the visitor to the resource and its caretakers. Plans guide the sustainable use of facilities and features so that visitors can find meaning in the cultural, natural, and historic values of a place or a region and its significance to their lives.

After reading this chapter, the interpretive planner should be able to develop a planning strategy that works for any particular situation. The idea of using themes as core planning guides should become meaningful and active. The chapter should help in understanding the interpretive prospectus used by consultants and various agencies. It also describes approaches to planning and gives examples of planning processes used in major federal agencies.

The key message of the chapter is that interpretive programs and facilities should proceed from careful planning (Figure 16.1). A plan or prospectus considers the clients, defines the genius loci, states themes, and prescribes interpretive methods and media.

The Essential Element: Vision

A National Park Service planner, Fred Babb, uses five key words to define planning work. Vision requires that interpreters design and paint a picture that people can understand and buy into. A need for change precedes a need for a plan; plans usually call for some kinds of alteration of the interpretive mix or methods.

Figure 16.1. Forest Service planner Kelly Clum and archaeologist Vince Spero review interpretive plans for Los Caminos Antiguos Scenic Byway.
and they direct how to go about it. *Risk* and *conflict* come with any change; planners must learn to work with them. The *challenge* is to facilitate and coordinate the planning process, then to present a plan to the owners, and to implement it with the staff.

A vision guides the planning process to achieve an end—a target. Too often, planners start their work hearing about problems rather than a vision or target. The problems include things as mundane as what to do about the water leaks, how to change the typeface on the brochures, getting an amphitheater, and reducing accidents at the overlooks—all important items, but not the vision. If the problems get top billing, the planner becomes a short-term troubleshooter. This can kill the planning process. The leader of the team must keep bringing the focus back to accomplishing the vision.

Bureau of Land Management (BLM) planning starts with this general vision statement:

> BLM’s interpretive program fosters an appreciation for the resources and an understanding about the relationships between people and the public lands. Interpretation communicates how the BLM manages resources and provides opportunities for public use. As a result of BLM’s interpretive program, the public will be more environmentally responsible while enjoying their public lands. (A. Galperin, BLM Lead for Interpretation, personal communication, November 20, 2001)

From this broad vision, the site vision evolves, focusing on what and how to best interpret the significant site to the visitor.

To develop a site vision, the team can try to use a zero-based approach, at least at the beginning. Mentally, wipe the slate clean. For a moment, ignore programming that “we’ve always done” and avoid focusing on barriers and limitations. Instead, ask questions such as

- What does/should this site really mean?
- What significant stories does/can it tell?
- What of great value does/could a visitor gain and take from here?

Think broadly, dream imaginatively, think analytically, believe in what the organization and its partners can do, and dare to take a thinking risk. It can liberate, both mentally and emotionally. Only after defining that unfettered vision, work on practical ways to achieve it with creative, practical imagination (Box 16.1).

**Interpretive Prospectus**

The key document produced for site-based interpretive planning bears the name of *interpretive prospectus* or *interpretive plan*. (Figure 16.2). From it flow other documents, such as exhibit plans, trail or byway plans, signage specifications, specific media development plans, sales plans, and others.

A plan may also cover more than one property—what Veverka (1994) referred to as a *system plan*. The system may involve several parks of one agency or may cross agency lines in a regional tourism plan, linking themes and interpretive opportunities to give the visitors some integration among federal, state, local, and private interpretive sites. This abets cooperation and operates in line with the way visitors act and perceive a tourist destination.

An interpretive plan arises from analysis of two key components in parallel: (a) the *consumers* or likely visitors and other clients plus (b) the *resources or facility*.

The plan identifies significant resource characteristics and features. It suggests how to relate them to the visitors, based on their characteristics, needs, and desires. It defines the interpretive vision of how the facility should best serve those consumers given its natural and cultural resources. From the vision, the plan proposes the themes and key stories that serve as the core messages of site interpretation. It then proposes a set of customer experiences to present the themes and stories, and prescribes the techniques and media to use in different parts of the site, within financial and physical limitations. The prospectus sets a style for the facility—the signs, the publications, the correlation of personal and nonpersonal services, and the balance of on-site and off-site efforts. It also considers timing and financing targets for the new developments. Thus, the prospectus guides the development of interpretive exhibits, products, and programs from start to finish.

As a specific example of recommendations, a prospectus may call for building an interpretive center to convey the major story of the site and to offer publications, reference material, and programs that provide the details. It would also prescribe other techniques such as wayside exhibits, self-guiding trails, brochures, videos, and virtual experiences to round out an effective interpretive program.
To strip interpretive planning down to the fundamentals, imagine yourself as an interpretive consultant on a foreign assignment. Visualize yourself sitting in a little hotel or bungalow in a steamy rural province of a foreign country. Outside the window lies a provincial park. You do not know the flora or fauna very well. You do not know much about the geology, limnology, ecology, culture, or history of this area, although you have a good educational background in these general subjects.

The provincial government pays you well, plus expenses, from their debt-laden public treasury. They want your advice on what and how to interpret this big park. They are quite hopeful that ecotourism will pay off for them. Your recommendations obviously have weight. You are their planner, here to write a plan in a month.

The time has come to list key points you hope to develop for your report and some key questions that you will ask tomorrow when the small park staff meets with you. What do you do? What approach will you take? Panic is not acceptable behavior.

Obviously, the government did not bring you here to turn you into an expert on the local animals and plants and ecosystems. They do not plan on your going to the library for months of self-education or to write interpretive booklets. Nor do they expect to pay you as an anthropologist or historian to study the human story of the park. They hired you as an interpretive planner—one who can look at the park as a visitor and as a professional, one who can see the staff and resources and, adapting to the conditions, suggest ways to provide effective, responsible interpretation.

They need both an ideal vision and a realistic strategy of where they can go, ideas of what they can do, and a sense of ways it will benefit their society. They need a document from you that will help them to persuade their legislature to dedicate funds to the park’s interpretive effort. They may even ask you to provide some rough cost figures and a calendar of development.

In other words, the government wants you, the interpreter, to do what you surely need to do at home, as well. For those who have sat in similar hotels or huts, looking at similar parks—through the Peace Corps, World Bank, universities, or as consultants—the foreign experience immediately focused our attention on how we could plan in a short time. It required concentration on consumers, resources, a vision, and ways to implement that vision. To approach this work, you need to start with a set of the vital questions for your planning that lead to your basic plan components. Then proceed to seeing the vision of what the place should mean and should interpret. Next go to how to get there, first in the long run ideal and in the short run of first priorities. Then consider the means for doing it.

—DMK

Figure 16.2. An interpretive prospectus or plan defines resource values, identifies interpretive themes, and prescribes the media and methods for presenting them.
A prospectus defines what and how a property or organization or region will tackle the task of presenting its stories to the public. It requires thought before action. A plan guides and coordinates the work of the interpreters. Without a prospectus, one can imagine confusion, division of efforts, and lack of a sense of purpose.

**Building the Prospectus**

The procedures for developing a prospectus vary with the agency and its guidelines. The following five steps comprise the principal elements of an interpretive prospectus, with some details and examples of applications.

1. **Consider the Clients**

Visitors' needs, perceptions, and expectations contribute to the planning process. Visitors may arrive in many categories, such as

- school groups seeking structured lessons that match their curricula.
- tourist buses with special interests among their passengers.
- families and individuals who arrive with diverse interests ranging from photographing awesome scenery to deep intellectual probing of meanings, from mountain climbing to beach combing.

Beyond the visitors, the facility may serve many who seldom visit but who learn remotely through publications, electronic media, newspaper columns, or talks and activities in their schools, neighborhood, or town led by the interpreters from the facility.

The planner seeks to learn who the clients are, how they experience the place, and what they want in the future. In an existing facility, visitors will suggest how to improve visitation experiences and how to better manage facilities and activities. The simplest way to do this involves handing out brief questionnaires or directly interviewing visitors at random times, then statistically analyzing and segmenting the responses. Focus groups of citizens and advisory committees of experts can also provide ideas. Public meetings may be required by agency rules.

An example comes from the BLM. It started its planning for upgrading interpretation at Pompeys Pillar National Historic Landmark with public meetings and input at Billings and Huntley, Montana, in 1993. In addition, about 450 visitors to the site responded to questionnaires during the 1993 and 1994 seasons. Data analysis led to a set of interpretive management options. By 1996, with further input from interest groups and public response, a record of decision outlined the need for a visitor center and an environmental assessment. By 1998, the BLM produced a site activity plan. This and the previous public input documents led to the Interpretive Prospectus (Montana State Office, 1998). A five-year process may cause some public impatience, but only a few would have the temerity to claim that they had no opportunity to comment.

The challenge consists of using client information to plan interpretation for every client and potential client so they tune into the vibrancy from what is going on now and what has gone on in this place. Planners help the interpreters to make the significance of the place come alive in each of their clients.

2. **Define the Resource: Interpretive Inventory**

Planners list and identify the significance of the features, resources, and history available for interpretation at the site. Separating cultural and natural resources at first helps to simplify the task. Later, the two get woven together by relating them to the dominant and subordinate themes.

Cultural resources analysis identifies the significant human stories of the area. In some cases this can be a record of people spending the day at one spot, such as some sites on the Lewis and Clark Trail and many battlefields. In other cases, the significance may cover part of a lifetime or generations of lifetimes spent at a location, such as the “this is our traditional home” focus of much interpretation by native peoples in Australia, Canada, and the United States.

Natural resource identification and listing leads to coordinating and prioritizing those aspects by their significance. Statements of significance suggest why certain resources are “special” or “representative” and how they might guide the theme of the area. Among natural resources, the interpretive planners generally deal with water as glaciers, rivers, lakes, or seas; geology and topographic features; flora and fauna; and soils, atmosphere, and climate. The unifying ecosystem approach relates or contrasts one place with the rest of the nation or continent. Their significance often comes from the story of the interplay of the various resources.
3. Develop the Themes

Identifying the dominant themes helps to focus the entire interpretive program. It gives a way to tie diverse characteristics of the site together. In the case of Pompeys Pillar, the main focus of interpretation is Captain William Clark’s trip along the Yellowstone. Themes and subthemes of various features on site connect the Clark trip and the site, through a close interpretive relationship among indoor displays, outdoor exhibits, and self-guiding trails along the river and to the hilltops (Montana State Office, 1998).

A total of about seven exhibit themes related directly to the Clark trip. Another seven explained the site as a crossroads in time, a second main theme. The exhibits and interpretive presentations of this more expansive theme show the importance of the area from its geological and topographic origins, and human use of the area over centuries until the railroad and farming era. Some of these were kept brief so as to enrich but not to distract from the Clark connection.

4. Prescribe the Interpretive Methods and Media

This step defines how to communicate the themes to the public. The balance between nonpersonal and personal delivery methods is important. They consider when the visitors come, how long they stay, and what they hope to do.

The design recommendations for facilities and interpretive media start with numbers based on visitation patterns. These include figures to guide design capacity for “normal” peak days, such as

- total annual visits.
- peak day visitors.
- persons at one time on site (“normal” peak).
- number of visitors in the interpretive center at one time.
- vehicles at one time on site.

Then the prescription should define the type of logistical visitor experience and its facility implications. For example, tracking a typical interpretive museum visit from a purely functional view might show this sequence:

Arrive by car; park—walk to the museum—outdoor and indoor orientation (to rest rooms, trails, gifts, programs) near the museum—encounter major theme statements to set up the context and principal messages—flow through the museum exhibits and to the outside—move around the site to major features and satellite facilities—return to museum—visit gift shop—exit the building and premises.

At each of these locations, consider signage necessary to orient and direct visitors, as well as interpretive signage and exhibits, location of personnel, and provisions for room to handle lines (e.g., information desk; cash registers; rest room entries; key, small, or interactive exhibits), group gatherings, and crossing points for foot and vehicle traffic.

The recommendation then proceeds to define the visitor center size and division of square footage among its various uses, including

- exhibit areas.
- auditorium(s) and multipurpose room(s).
- entry, rest room, and information areas.
- sales, administrative, interpreter, and volunteer offices.
- work spaces and storage.
- food and drink dispensing, lunchroom, or outdoor eating area.
- classroom for group gatherings.
- unloading and parking areas.
- waste collection and disposal facilities, including septic systems and solid waste dumpsters access.

Other facilities may involve special use areas for cultural events and materials storage, temporary art exhibition areas, and training facilities. Putting these in a logical sequence falls on the architect, but usually requires a clear statement of design intent from the interpretive planner.

A similar sequential path may be developed for the visitor’s mind. It would define the strategy of arranging interpretive incidents (signs, exhibits, introductory talks, immersion programs, field walks and explorations, synthesis sessions, review and final revelations) so they allow visitors to choose and build a meaningful experience. Two or three packages of incidents could be concocted for each major theme, one for a short stay and others for longer stays.
Satellite interpretive areas and facilities provide further interpretive services that develop and complement the exhibits in the visitor center. In the prospectus, the planner defines where interpretive trails lead, what themes will connect to their stories, where signs or outdoor exhibits shall go, what trail guide brochures will interpret, and how overlooks of special features will accommodate groups while presenting both personal and nonpersonal interpretation. Sometimes, the details of trail design and other satellite interpretation facilities appear in a separate trail plan.

5. Describe How to Implement the Plan

A balance of skills in the design and implementation process requires cooperative work between interpreters, architects, landscape architects, and engineers. Their recommendations appear in a master plan, in construction plans, and in landscape designs. These must communicate clearly and simply with the construction team. Details will always produce questions, especially with electricians, plumbers, and interior finishers. A general contractor presumably coordinates all of this. However, regular, frequent, discrete, careful inspections by the designers who know how they expect to use the facility will help prevent (or quickly correct) omissions or mistakes.

Specialized personnel or contractors usually carry out exhibit design and installation. Diplomatic, firm, and frequent oversight of the process by the interpretive staff will reduce irreversible mistakes.

Dynamics of Practical Planning

The second section of this chapter presents observations on the dynamics of planning. It includes ideas on how to work in teams, how to use creative thought processes, how to combine resources and consumers, how to develop themes to achieve the vision, and a short message on how to balance personal and nonpersonal services.

The Planning Team

To define a vision requires a team, including the site (or museum) management staff and interpreters. The team also should include or meet with upper administrators, perhaps a political leader, and customers. An outside planner often chairs the team and coordinates the process to prevent suppression of thought among staff or local citizens due to hierarchy status.

The team can be flexible in size as the work progresses. At some steps, local or general public input may swell the number of people involved. When writing, a core team will do most of the work with assigned sections and plenty of revision, or with one or two doing most of the drafts and the others checking, editing, and refining.

An efficient approach keeps the core team small and very active but open to many ideas. With the complex processes required for an interpretive plan, involving a lot of creativity, a small group taking input and review from others provides an expeditious way to proceed. With the emphasis on government-citizen interaction, large planning groups often get unwieldy and even simple group decisions take a lot of time.

Keeping the planning team members focused on the task is somewhat like trying to herd cats. The group needs a facilitator with compassion but a firm sense of accomplishing the mission on time—not necessarily the leader. It needs listeners who integrate ideas and write boldly and clearly. It needs visionaries who can see the big interpretive picture, who can comprehend the people, the resource significance, the interpretive methodologies, and the practicalities as one big whole. A core planning team seldom needs a naysaying complainer (they prefer the title “realists”), a dogmatic upper administrator or board member, or a lawyer. These serve as advisors when needed for specific purposes.

A team completely from inside the organization has limitations, unless it is a large organization. A few independent planners who come from outside the tradition may bring fresh perspectives of great utility. On the other hand, a team composed of only outside consultants may crank out a prospectus very astutely and quickly, but it may ignore important agency policy or traditions. If internal authorship is absent, perhaps no one will read the plan with true understanding nor have the impetus to implement it. Astute consulting planners insist that key agency personnel (e.g., interpreters) and local leaders participate fully in the planning process. They structure the steps to optimize local “buy-in” opportunities and subsequent advocacy of implementation.

Planning Approaches

Experience teaches that if you give a planning group a clear process to follow, things go faster. The inter-
interpretive planner can use one of several approaches to planning. As written they seem linear, but that is for simplicity of explanation.

Most people do not really function in straight lines during creative moments. One experienced planner says he operates in linear fashion with occasional holistic bursts of inspiration. These inspiration bursts of energy drive the planning team along its somewhat linear path toward completion. Often, the imaginative spurts of just one person define the vision, suggest the alternatives, and/or justify the choices and direction of the plan. Then the group refines, adjusts, and finally writes and endorses the plan. Commonly, several different creative spurts occur. They can be considered as alternative directions or complementary subparts of the vision definition. They may "set back" earlier progress or even reverse directions. Many planning teams of even two or three people report changes of pace, from a fast start to long slow periods of little apparent progress, to sudden whirlwind sprints, then long, tedious writing and editing periods, then a quick spurt at the end of the process.

Many different linear planning processes exist. For example, one common general planning sequence follows these five steps:

1. Define the problem/opportunity, so everyone starts from the same point.
2. Gather and analyze the basic facts and constraints of the opportunity.
3. Suggest alternative solutions or recommendations.
4. Establish criteria for analysis and comparison of alternatives.
5. Select the solution and describe it so it can be implemented.

That process seems simple and orderly; however, even these five steps will overlap and may change order. Discussions frequently get people involved in solutions before the problem gets well-defined. Often, an interpreter cannot really analyze the problem until some ideas of solutions and alternatives arise.

Another list of the thought process follows, for comparison. It shows stages where planners seek administrative/public/staff participation to get useful input and, hopefully, support.

1. Determine and state the scope of the plan. Get buy-in.

2. Develop the vision by discussing opportunities, needs, dreams, expectations, the resource's significance, its purposes, and its administrative mandate. Get buy-in.
3. Define objectives, as realistic stepping stones to achieving the vision.
4. Set out visitor and resource management facts and concepts.
5. List the important issues.
7. Choose and develop the recommended alternative.

* Reminder: The vision determines what interpretation should do on the site. It does not refer to what is wrong on the site.

Again, this appears as a more linear process than is possible. The team can divide into subunits to collect and analyze the various kinds of data and input, then assemble them for decision-making processes.

As mentioned, planning really aims at recommending ways to achieve a vision or final outcome. Therefore, it is not the planning process that matters in the end. The process just shows how to think about getting a plan written. Even the large federal agencies regularly alter their planning procedures, the shape and names of their documents.

**Matching Resources and Customers**

The crux of marketing is putting demand together with supply. In interpretation, demand comes from the visitors and other clientele and supply comes from the cultural and natural resources and the people who interpret them through personal and nonpersonal methods.

Many different consumer analysis methods appear in other parts of this book. Statistical demographics, visitor satisfaction, public involvement, willingness to pay, and market segmentation processes may come into play in a planning process. The following three market-focused processes deal with specific planning for how visitors will be able to interact with the resource in ways they will enjoy and that will produce memorable interpretation.
1. Learn About the Customers

Public agencies providing natural and cultural resource areas have made impressive progress in using social and behavioral sciences. Economics and marketing now focus first on consumers and the products they desire rather than focusing first on the products and how to get the consumer to buy them.

Likewise, interpreters define recreational needs and interpretive opportunities in terms of what the visitors desire—what kind of recreational interpretive experiences they seek. To discover this requires more than just leaving it up to the interpretive planner to somehow know or divine it. It requires public input at early stages of planning.

Before writing down planning assumptions, ask the customers what they would like, usually in a formal way. The consumer-oriented outcome can be called the desired experiences or the experience opportunities (Pulsipher & Parker, 1980). Then follow up by seeking specific input by visitors at various stages of planning. An interpretive planning team could serve itself well by including one permanent member who acts as a visitor advocate.

As noted previously an early step defines the visitors that come now and the ones that are expected or targeted. Important characteristics include

- Are they local and/or outsiders? What languages do they speak? What cultural context and interests do they bring?
- How long and where do or can they stay? Are they visiting out of a tourist hotel complex across the island or will they camp in the forest or on the beach?
- How do they now use the facility in terms of activities, size of group, and length of stay?
- To take advantage of the resource more fully, what must they do? Backpack or ride for several days? Descend into a cave or mine? Be out at night? Stop by for an hour or two during the day? To get the essence or the immersed experience—the real value of the place—what would interpreters offer/require in terms of time, movement, equipment and guided services? Might it be a three-day safari, a week-long expedition across the glaciers to observe rare species, an elevator trip or hike into a huge cavern, or a tour of a factory with safety precautions? What barriers or trepidations might these activities produce to different groups?

Collect the available visitor data from the interpretive staff or their consultants. Ask front-line staff for their observations of visitor needs and desires. Conduct interviews with visitors or request responses to questionnaires that focus on what this place does for them and what it might do. Beware of compiling a list of minor complaints; search for the big picture that will lead to stronger service. When alternatives are first developed, visitors might be asked to comment or vote in an advisory capacity.

2. Plan for Visitor Experiences

Experiential marketing plans recognize that visitors seek experiences. When they look at brochures, they want depictions of powerful, deep experiences. Then, they want follow-up when they arrive. They seek a package; it may include several interpretive programs, self-guiding trails, and birdwatching. They seek a set of activities that they can define with a purposeful name.

The planner needs to customize plans for the visitors (Veverka, 2001). Mass customization recognizes the advantages of mass producing services and programs while building in the flexibility to meet individual or group needs. Personal interpretation, if done by professionals, fits this flexible model easily. Nonpersonal interpretation requires packaging combinations of various built-in options and media, as has been described in earlier chapters.

First and foremost, focus on the visitor experience—the essence of the interpretive plan’s vision. The approach to interpreting a museum, forest, park, or reserve starts with what the clients seek, hope for, and enjoy fully (O’Sullivan & Spangler, 1998).

Then, this should lead to alternative techniques of presenting the interpretation. Value as a planner arises from how one helps to define the interpretive philosophy, sets the strategy, and identifies the types of themes and messages that will help the agency achieve its interpretive goals. The visitor experience really boils down to how the visitor will interact with the resource or museum. The interpreter provides brochures, exhibits, information, talks, walks, and films to help make the interaction possible. On the planning team, the interpreter and selected visitors describe how visitors now use the resources and how interpreters can promote more favorable, more productive, and more enjoyable experiences.
3. Plan for Memories

During the planning process, think marketing— matching visitor desires to the resource and program. Also think postexperience memories. Map the site for making memories of an interpretive experience (Veverka, 2001). While planning, think ahead to memories people will take, and the memory enhancers that will recall their interpretive experiences—something beyond the cap or T-shirt with “Disney” emblazoned on it.

First, look for and plan the best and most powerful memories that a visit can provide. This may involve a spectacular scene, a special action or demonstration, the oldest tree, or some personal achievement. Identify places and features where they will take pictures and make it possible to put themselves in the picture (safely). Identify the places that will evoke memories that visitors discuss as they drive home.

Second, develop memory enhancements related to these key places. The most common of these include videos, T-shirts and postcards. However, interpreters have invented many more intriguing, site-specific souvenirs, simple art pieces, awards, and strategic photo opportunities. Some of the most effective, where permitted, include a small collection of identified rocks; a set of identified cones or seeds/fruits; a replica of an artifact as simple as a rifle ball or as elaborate as the Liberty Bell miniature. The most meaningful come from visitor art or crafts at an interpretive event. These reinforce and remind the visitors of the interpretive themes and experiences.

Developing Statements of Themes

Themes are those ideas so important that every visitor leaves with them imbedded in the mind. Selecting the best, most important, most relevant, most interesting, and most appropriate themes may be simple or it may be agonizing. It usually requires a narrowing or focusing process.

The vision statement should suggest key themes. Likewise, the genius loci—the essence of the place, its character, its special qualities, its significance—should direct the selection of themes (Figure 16.3).

Selection of the themes may start with founding purposes or legislation from the board of directors or legislature. They often have written down the purpose and special values of a place—the raison d’être. For example, the property may be set up to interpret a subject such as 19th century mining technology. The concepts to teach may be the immigration patterns of the West.

Sometimes, however, interpreters must read the themes from the site itself. Some organizations eager to save wetlands or historic buildings do their acquisition work, then turn to the interpreter to figure out the public significance and story of this old swamp or that once rickety restored building.

Anyone who works hard on an interpretive site can find many possibilities for interpreting natural and historic phenomena in the area. With careful observation and research on the area, the list of possibilities can become extensive. Unless the special character of a place stands out, it may be difficult to narrow the topics down to a few themes that the visitors can comprehend. Techniques of selecting themes may include:

- community and visitor suggestions of what it means to them.
- ties to other community structures or landmarks, in the past or now.
- uniqueness or rarity, heritage value.
- special ecological or cultural functions.

The basic facts have to be researched and recorded in a plan to prevent the development and reiterating of legends and other factual errors. Even simple things such as calling a stand of tamaracks a “cedar swamp” can hang on for years to the discredit of interpreters.

Balancing Personal and Nonpersonal Services

Once the themes are stated, the team can focus on the mix between personal (guided) interpretation and nonpersonal services. Various alternatives arise, from personal to nonpersonal. The balance of these alternatives derives from study of costs and staff and the nature of the messages. Where the messages should be available day and night, or when the messages are located in remote or little-used places, nonpersonal interpretation seems appropriate. Personal interpretation has its role where guiding, questions and answers, flexible learning, and encouraging visitor action are desired.

The planners may wish to present several alternative mixes. They should describe the costs and consequences to benefits related to each alternative.
**Models of Interpretive Planning**

The third section of the planning chapter presents different models of procedures and organization. These will suggest ways that a planner can conduct a consulting job or guide a team. Interpretive planning by different agencies uses variations on the approaches presented previously. The Bureau of Land Management and the National Park Service general procedures follow. Then, the Forest Service’s approach to Visitor Center planning is presented. Finally, a case of planning for major programming changes describes the process and the consequences. Please note that these agencies frequently adjust and modify their methods to improve their efficiency or to meet a particular preference. The specific steps here may be out of date by the time they get in print; read them as workable examples of approaches, not as absolutes.

**A Bureau of Land Management Planning Process**

The following five steps that have been used by the Bureau of Land Management define an interpretive planning process.

1. Formation of planning team
   - from the public sector
   - from the private sector

2. Interpretive inventory
   - audience analysis
   - cultural and natural resources
   - current interpretive services

3. Preparation of the plan
   - area overview
   - goals, objectives, and themes
   - program components

4. Implementation requirements
   - equipment
   - site development
   - maintenance
   - time schedule
   - program budget

5. Monitoring and evaluation
   - plan monitoring
   - effectiveness evaluation
   - plan revision

Interpretive planning in the BLM gives a role to internal and external groups. They meet together to set out clear, measurable objectives, and measure the cost-benefit ratio and program effectiveness measures.

BLM’s guiding theme for interpretive programs states “the resources on public lands are an integral part in people’s lives and BLM is working to protect the value of these resources for all generations.”

For planning, the agencywide vision statement and this guiding theme provide the basic concepts and directions for site planning.

**National Park Service Interpretive Plans**

The National Park Service thrives on tweaking and testing new planning formulas and methods. Several people in the NPS work as professional full-time planners. In that job, concern for the planning process results in constant examination and improvement of it. These planners collaborate with chiefs of interpretation in each of more than 380 properties.

The people involved represent (a) Park Staff, (b) Regional Office, (c) Harpers Ferry Center for Interpretation (HFC), and (sometimes) (d) Denver Service Center (DSC). Many park partners also get involved, such as professional agencies (e.g., U.S. Geological Survey, U.S. Fish and Wildlife Service, USDA Forest Service, state and local agencies), business partners (e.g., neighboring landowners, lodges, cooperative associations, tourism groups), community partners (e.g., schools, civic organizations, museums), and cultural and tribal nation partners.

Each park prepares a Comprehensive Interpretive Plan (CIP). This plan defines the interpretation effort in broad context and general parameters. The CIP has three or more supporting plans that spell out specifics. The Long-Range Interpretive Plan looks ahead at specifics for the next five to ten years. It approximates what was described earlier as an interpretive prospectus. The park also maintains an Interpretive Media Inventory that catalogs all the signs, waysides, exhibits and publications available to the public inside and outside. Likewise, it keeps up a Scope of Sales document that analyzes the cooperating association’s materials and their sales records. In addition, other documents record action and plans for areas such as Environmental Education and Community Outreach plus special interpretive activities that occur in individual parks.
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2. **Interpretive inventory**
   - audience analysis
   - cultural and natural resources
   - current interpretive services

3. **Preparation of the plan**
   - area overview
   - goals, objectives, and themes
   - program components

4. **Implementation requirements**
   - equipment
   - site development
   - maintenance
   - time schedule
   - program budget

5. **Monitoring and evaluation**
   - plan monitoring
   - effectiveness evaluation
   - plan revision

Interpretive planning in the BLM gives a role to internal and external groups. They meet together to set out clear, measurable objectives, and measure the cost-benefit ratio and program effectiveness measures.

BLM’s guiding theme for interpretive programs states “the resources on public lands are an integral part in people’s lives and BLM is working to protect the value of these resources for all generations.”

For planning, the agencywide vision statement and this guiding theme provide the basic concepts and directions for site planning.

National Park Service Interpretive Plans

The National Park Service thrives on tweaking and testing new planning formulas and methods. Several people in the NPS work as professional full-time planners. In that job, concern for the planning process results in constant examination and improvement of it. These planners collaborate with chiefs of interpretation in each of more than 380 properties.

The people involved represent (a) Park Staff, (b) Regional Office, (c) Harpers Ferry Center for interpretation (HFC), and (sometimes) (d) Denver Service Center (DSC). Many park partners also get involved, such as professional agencies (e.g., U.S. Geological Survey, U.S. Fish and Wildlife Service, USDA Forest Service, state and local agencies), business partners (e.g., neighboring landowners, lodges, cooperative associations, tourism groups), community partners (e.g., schools, civic organizations, museums), and cultural and tribal nation partners.

Each park prepares a Comprehensive Interpretive Plan (CIP). This plan defines the interpretation effort in broad context and general parameters. The CIP has three or more supporting plans that spell out specifics. The Long-Range Interpretive Plan looks ahead at specifics for the next five to ten years. It approximates what was described earlier as an interpretive prospectus. The park also maintains an Interpretive Media Inventory that catalogs all the signs, waysides, exhibits, and publications available to the public inside and outside. Likewise, it keeps up a Scope of Sales document that analyzes the cooperating association’s materials and their sales records. In addition, other documents record action and plans for areas such as Environmental Education and Community Outreach plus special interpretive activities that occur in individual parks.
Conceptual planning is done by a team made up of park staff, the DSC, HFC, and usually a regional office representative. The Harpers Ferry representative usually comes from its Division of Interpretive Planning. Increasingly, interpretation and visitor experiences take a leading role in the planning process. As the key output of a park visit, the identification of interpretive values and the park’s reason for being serve as primary guidelines for the plan. Before 1960–1965, Master Plans focused almost exclusively on physical facilities such as buildings, utilities, and roads, with park values and prominent features as an important consideration. There was little writing about ecosystem problems, the flow and sequence of visitor experiences, and contacting and informing the visitor, except as incidentals or afterthoughts.

Much of the major interpretive implementation work requires collaboration with the Harpers Ferry Center. Each of these steps usually involves specialized planning documents, as well. For example, the park would prepare exhibit plans for indoors and/or outdoors for production by the HFC divisions of exhibit planning and design and wayside exhibits. The HFC also provides assistance in audiovisual production and planning, publications, especially brochure/maps and site booklets. Documentation and plans for care and conservation of historic furnishings and special artifacts goes through HFC or carefully designed private contract procedures.

Visitor Center Planning: Forest Service Style

National Forest interpretive facilities that require development or renovation that costs over $250,000 must have top-level approval. Therefore, they need an interpretive plan. The USDA Design Center in Washington reviews them for process, technique, and construction alternatives. The Chief of the Forest Service and USDA officials also study the plans.

To get started, the region submits a short (less than 20 pages) Interpretive and Design Prospectus and cover letter to the Chief to request a review and project approval. Its outline includes:

1. Purpose of facility
2. Basic marketing information
   - audience—projected visitation
   - projected length of stay
3. Interpretive programs and facility
4. Objectives
   - what visitors will do, feel, and know after using this facility
5. Functional uses of the facility
   - information/orientation area
   - exhibit areas
   - audiovisual requirements
   - administrative uses
   - interpretive sales areas
6. Scale of development
   - estimated square footage of facility
   - operation and maintenance plans and considerations
   - estimated costs
7. Suggested media treatments
8. Simple site plan (if available)

Figure 16.3. An interpretive plan starts with definition of the character of the place and develops the explanations of stories, themes, and media such as the John Brown statue that graces his farm and shows the concern for slaves that characterized his life and led to his death.
After a response (within four weeks), the region and forest may proceed with more detailed planning. Some of the key guidelines in planning include the following:

- Provide enough space without waste (include storage and archives).
- Choose the theme and subthemes carefully.
- Consider the audience throughout the process.
- Carefully consider what is worthy of display; avoid too much material; do not tell too much.
- Seek a design with visual appeal that emphasizes the genius loci.
- Lay out the design both visually and by narrative; combine the key elements in a logical manner.
- Use visual materials such as artifacts or replicas, photos, drawings, maps, charts, and graphs.
- Study the message; know your subject; describe it briefly but enough to get the message across; use humor where appropriate.
- Make all lettering big enough to read easily at an average viewing distance for that facility; make labels and text brief but appropriately informative; separate the text into small portions to facilitate reading.

**Facility and Program Rehabilitation Planning**

Major rehabilitation of existing facilities or exhibits requires planning. Often a new prospectus coincides with a rehabilitation program. Then, the interpretive planning team can wipe clean the slate of ideas and exhibits, and start over, with the exception of using functional buildings, roads, and trails. For example, the National Park Service seldom keeps older exhibits in its prospectus planning process, so the planning process may as well start at ground zero. New exhibit climate control and materials will almost prohibit recycling of most older exhibits. Bright lights in old closed cases produce high temperatures, which then cool at night. This contributes to deterioration of the artifacts and fading of colors. Newer, cooler lighting systems often require new housing.

Sometimes staff interpreters become planners by assignment. Their job is to remodel long-standing programs as well as facilities. This happened to two new interpreters/educators at Morton Arboretum. They learned that recommending and implementing change is stressful and requires diplomacy, persuasion, persistence, and even long-suffering forbearance as necessary tools of the trade (Box 16.2).

**Implementation**

*No battle plan ever survives contact with the enemy.*

—Ancient military proverb

The lack of fidelity to plans, once the action starts, usually distresses the planners and causes the manager to wonder about the lack of prescience of those planners. Things change. Conditions unanticipated in the plan require new responses. It is a universal phenomenon.

Plans hopefully provide a foothold in the rush of events. As a museum exhibit gets rushed to completion, builders, electricians, carpenters, and other preparators often make changes—some inadvertently—in the plans drawn on paper. Likewise, an interpretive plan may call for a certain mix of activities and programs; when one type does not work well, the interpreters may drop it, if by public demand.

The plan should state key principles and clearly explain the necessary details, without descending into minutia. Planners should produce a plan that the implementers will read and later return to as a reference. Often, planners seem to write and draw for themselves. Managers need concise, clear sections with just enough detail to clearly convey the ideas and approaches, while stimulating and guiding the imaginations of interpreters and their supervisors.

**Summary**

Considering all the procedures reported in this chapter, planning may seem distressingly complex; however, interpretive planning boils down to three steps:

1. Gathering background facts and questions—goals, target audiences, opportunities, options, and circumstances or limitations.
2. Making planning decisions—themes (messages), media prescriptions, priorities.
3. Implementing the plan.

Above all, planning requires the right information. The planner seeks and finds facts and opinions.
best planners have the skill and imagination to get and use the best information. They know how to gather, perceive, and comprehend the information, and transmit it so it leads to effective decisions. They have a knack for getting the feel of the place, the sensitivity about what is important. The various guidelines presented here allow the planner to ask the right questions, in the right order, to get the right information. They also allow clear communication of the planning process to those who make, fund, and implement the decisions.

Planning requires imagination. Creative thinking simply means looking at things in different ways from the norm. What needs to be done? What various ways can get it done? What are the long-term consequences? Not everyone makes an imaginative planner, but most people can contribute constructively to a plan.

Planning needs a modern marketing twist. Start the plan by gathering information on the potential consumer. Create enjoyable and enriching experiences and opportunities for that consumer through the plan. Then make sure that memories go home with the visitors.

A plan can identify products and services intended to result from implementing the plan. Write this in the form of mission statements and objectives in terms that allow measurement of the outcome (consumer experiences).

In the planning process, look beyond any one property. Try to fit the property interpretive plan into district, regional, and adjacent community plans or activities.

An interpretive prospectus should provide a thorough analysis of (a) the purpose and special qualities of the area, (b) the expected visitors and their activities, (c) the opportunities for interpretation, and (d) the interpretive experiences the interpreter can provide them. Beyond this, no single formula exists for an interpretive prospectus (unless an agency prescribes one). Each property, museum, county, or factory should be approached as a unique resource with its own outline.

To restate the first paragraph of this chapter, the planners have the duty to

define how to explain the resources, describe ways to build or produce experiences, provide interpretive strategies, and guide the use of tangibles to reveal intangible values and meanings. The visionary planner who achieves this brings a great service to the profession and its clients.

Box 16.2 Planning and Implementing Program Change at Morton Arboretum

School tours of a casual walk-and-talk nature using a spontaneous “teachable moments” approach had served the Morton Arboretum for 20 years. Paid “volunteer” guides led children through various parts of the Arboretum’s 12 miles of hiking trails. They had no consistent, formal goals and objectives, no curriculum-based standards. Students were listening but not participating in an organized way. Tour numbers declined from 18,000 in 1997 to 16,300 in 1999. Schools showed withdrawal plans.

New supervisory interpreters came in the crisis year of 2000. They met with teachers and guides, evaluated, and proposed these changes:

- Learning goals and objectives
- Themes with curriculum relevance
- Grade-appropriate tours and activities
- Guide job descriptions and schedules
- Guide training and certification (with provisions for veteran guides)
- Teacher training
- Backpacks with tools for student fieldwork and measurements
- A guide manual with objectives and directions
- Clearer scheduling, with two 1.5-hour sessions per day

One guide predicted “The doors will be locked in six months if these changes occur.” Guides resisted the “too complicated” worksheet, new bus and tour schedule, specific tour locations, tour activities. Most of the 53 guides resisted changing what they had done for years: 6 retired; 19 left due to the two day/week commitment; 10 quit. That left 18 guides. Recruitment added six more. These 24 served more students than the 53 had before.

Teachers and principals said yes to the changes. They brought 24,000 students to the arboretum in 2001, a 47% increase over 1999. They helped with midseason program adjustments. They supported the program before arboretum administrators and directors. Some won education awards for integrating field participation with classroom studies.

The new program received approval from the Board of Directors, new guides got training, evaluation became a habit, grants for teacher training came in, and partnerships with school districts grew in numbers. Careful planning paid off despite a tense period of change. The staff planners kept their jobs despite many days of doubt.

Source: Leonard and Hootman (2001)