

Interpretive Planning

National Park Service

Interpretation and Visitor Services
Guideline

NPS-6, Chapter III



Interpretive Planning



Department of the Interior
National Park Service

Autumn 1996

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Preface

The air was electric with change in the summer of 1995. That summer saw the National Park Service (NPS) fulfill a political mandate to downsize the agency. Now having fewer personnel to perform the same mission, the agency's management philosophy was also, of necessity, fundamentally transformed. The resultant philosophy not only changed the agency's organizational systems but, more importantly, it altered roles and responsibilities.

The NPS had been managed like most other government agencies: as a centrally-controlled, top-down, chain-of-command organization. The new agency philosophy emphasized a non-centralized, place-authority-and-responsibility-at-the-lowest-possible-level, parks-in-control management style.

Accordingly, the responsibility for procuring park interpretive planning now rests squarely on the park superintendents' shoulders. Instead of waiting for their turn on a servicewide planning list, parks now have the responsibility and latitude to seek interpretive planning from a broader range of sources: service centers, system support offices, other parks, and private-sector contractors.

Concurrent with the servicewide reorganization, a team of interpretation managers, supervisors, and planners had been working together to continue the on-going evolution of interpretive planning. This group sought to integrate the best of the Service's processes and techniques into a unified process. This process — Comprehensive Interpretive Planning — was adopted as the re-written interpretive planning chapter in the Service's *Interpretation and Visitor Services Guideline* (NPS-6). In September 1995, this new chapter was released servicewide. Excerpts from the cover memorandum state:

...While most of the components of this system have been proven elements of Interpretive planning for years, they have never been gathered into a comprehensive approach that includes both long- and short-term planning needs. The intent is to create a long-range vision for park Interpretation and to simplify the annual Interpretive planning process....

This chapter proposes that Interpretive planning be considered as a process with high quality visitor experiences as its end product rather than as a series of separate tasks....

Although the Comprehensive Interpretive Plan (CIP) as defined in this guideline is composed of specific elements, it should be clearly stated that any good planning is customized to meet the individual park's needs, conditions, and situations. The CIP is *not* a recipe; rather, it is a guideline for efficient, effective, goal-driven planning. And just as parks have been empowered to pursue planning through various providers, they have also been given the responsibility to seek planning which is *most appropriate* to their needs.

The heart of the CIP is the Long-Range Interpretive Plan (LRIP) — almost everything is tied to it. The LRIP defines the overall vision and long-term (seven to ten years) interpretive goals of the park. The process which defines the LRIP also encourages development of targeted, realistic strategies and actions that work towards achievement of the LRIP's goals. These actions are divided into annual, achievable steps, and are reproduced in the CIP's Annual Interpretive Plan. Creating annual plans via this "stepping-down" of the LRIP simplifies much of the annual planning process because specific goals have already been identified in the LRIP.

The structure of the CIP has also been designed to facilitate improved timeliness on the part of planners. It is estimated that the first useful version of a CIP is produced in less than one year. Note the use of the term "first useful version." The CIP is designed to be updated by the park as frequently as park circumstances require. Therefore, the CIP is never really "finished" but should continually evolve to address new challenges and maintain its relevance to park management efforts. And by virtue of the new NPS management philosophy placing more responsibility at the park level of the Service, park staffs are now encouraged — perhaps more than ever before — to *actively* keep their interpretive plans up to date.

The CIP is the product of many years of interpretive planning evolution. As such, the goal of the CIP process is *not* the creation of a plan. The CIP's ultimate goal is the development of a cost-effective, tightly-focused, high-quality park interpretive program that effectively addresses all audiences and achieves management goals.

Introduction

Interpretive planning is a strategic process which, in its implementation, achieves management objectives through interpretation and education. Interpretive planning is comprehensive. It analyzes all needs and recommends a wide array of interpretive services, facilities and programs to communicate in the most efficient and effective way the park's purpose, significance, themes and values. Interpretive planning is a goal-driven process which describes visitor experiences and recommends appropriate means to achieve them while protecting and preserving park resources.

Policy

Interpretive planning is addressed in National Park Service Management Policies under both "Park System Planning" and "Interpretation and Education." Policy states that interpretive planning is a vital component of the NPS planning process. According to policy, the Statement for Management identifies park significance and establishes management objectives, including those for interpretation. Building on these, the General Management Plan (GMP) develops proposals for visitor use and interpretation. Implementation plans, one of which is the Comprehensive Interpretive Plan, provide the detail necessary to put the recommendations of the GMP into action. Interpretive planning is a vital component of all GMP efforts, Development Concept Plans, Special Resource Studies, and Statements for Management.

Why is interpretive planning important? Interpretive planning serves as the basis for all management actions regarding

interpretation within a park. According to policy, interpretive planning will:

...establish a balance of services based upon criteria such as level of visitor use, nature of park resources, park management goals and related factors... and ...identify a level of interpretation that is core to the mission of the park...



Basic Principles of Interpretive Planning

1 The interpretive planning process is goal-driven. Goal-driven planning is based upon a hierarchical system of goals, beginning with the Organic Act of 1916, specific area legislation and the Statement for Management which then defines the "big picture" and the vision for the park, its resources and public use. Goals which direct the planning process are rooted in a clear identification of the purpose and significance of the area. Purpose is derived largely from the park's legislation and defines "why" the unit was established and what its purpose is today. Significance statements describe the importance or distinctiveness of the area and its resources.

2 Interpretive plans describe visitor experiences which are directed to a variety of publics, both in-park and outreach audiences. The process then recommends appropriate means to achieve visitor experience. Visitor experience is everything that visitors do, sense and learn; it includes knowledge, attitudes, behaviors, and values; it is affected by experiences prior to the visit and affects behavior after the visit. Sound interpretive planning defines desirable and diverse experiences, recommends ways to facilitate those experiences, and assures they are accessible.

3 Interpretive planning recommends appropriate interpretive services, facilities and programs to communicate in the most effective way the park's purpose, significance, compelling stories, themes and values, while protecting and preserving park

resources. The outcome of interpretive planning is effectiveness in communicating the park's story in a larger context, the values associated with the resources themselves, and achieving the balance between resource protection and visitor use.

4 Interpretive planning will be facilitated by a person who has demonstrated competencies in interpretive planning. Portions of the planning process will be developed by park staff, guided by interpretive planners, and interpretive planning principles and standards.

5 Interpretive planning is flexible, ongoing, interdisciplinary, responds to client needs and is management-oriented, rather than development or issue-driven. Planning establishes a foundation for long-term direction-setting, short term problem-solving, and annual program analysis.

6 The interpretive planning process extends beyond park boundaries. Planning incorporates concessions and cooperating associations as well as local communities, regional partnerships and subscribes to the principles of sustainability.

7 Interpretive planning is based on current research. Recommendations for personal and non-personal services are rooted in solid subject matter expertise, and reflect knowledge of visitor expectations, demographics, changing social trends and needs.

8 Interpretive planning recommends the most current and appropriate techniques and media, suggests effective approaches for personal services, and draws upon current educational philosophy in program planning.

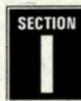
9 Interpretive planning includes practical strategies for implementation including funding and management alternatives.



Comprehensive Interpretive Plans

The Comprehensive Interpretive Plan forms the overall vision and basis for decision-making relating to interpretation in a park. It provides both a long-range and short-range view and deals with all media and personal services. The Comprehensive Interpretive Plan is a collection of the various planning documents and databases developed for interpretation in a park. It is not an accumulation of information but a solid blueprint from which the park's interpretive future is built. The principle sections of the Comprehensive Interpretive Plan are: the Long-Range Interpretive Plan, the Annual Interpretive Plan, and the Interpretive Database.

The Comprehensive Interpretive Plan should contain the following:



Section I Long-Range Interpretive Plan

The Long-Range Interpretive Plan provides a vision for the future of interpretation. The projected life span of the Long-Range Plan is recommended to be seven to ten years, but this may vary with individual park needs and circumstances and should be updated as necessary. It addresses both personal services and media, and is prepared by the park staff with a facilitator skilled in interpretive planning. It also provides the foundation elements for the Annual Interpretive Plan and should be consistent with other current planning documents.

The roles of the park staff and the planning facilitator will be identified in the Scope of Work prior to the start of planning. The roles will vary depending on circumstances and the abilities of park staff or facilitator.

**Part 1
Background for Planning**

Purpose and Significance. This section is a brief narrative of the legislated purpose of the park and a description of its overall significance. These statements are based on the legislation, Statement for Management, and the General Management Plan.

Themes. Themes are the key statements defining the park's significance and resource values. Themes should be stated as single sentences, may be divided into primary and secondary, and should be prioritized. These statements connect park resources to the larger processes, systems, ideas, and values of which they are a part.

Goals. Goals describe management's intent in offering interpretive programs and services. They are statements that describe opportunities for visitors and suggest how a visitor services program may change the way visitors will think, feel, or act as a result of their park visit. Goals are always derived from park interpretive themes and overall management objectives and are long-range. This section may also contain objectives which define specific outcomes for the interpretive program.

Visitor Experience Statement. The description of the Visitor Experience relative to interpretation defines how the interpretive process will facilitate a physical, intellectual, and emotional experience based on previously described themes and goals. It will include a description of expected outcomes.

Issues and Influences Affecting Interpretation. This section includes any long-range servicewide initiatives, influences outside the park, resource-based issues, and internal issues which will affect interpretation.

Visitor Profiles. This is a description of park audiences and their needs, both actual and potential. When possible, this should be based on systematic surveys.

Existing Interpretive Facility and Media Conditions. This description establishes a point of departure for future media and facility development proposals.

Part 2 Interpretive Program Description

This part describes the mix of services and facilities, both personal and non-personal which are necessary to achieve the park's management objectives and the interpretive mission. This section meets the requirements of NPS policy by identifying the "...level of interpretation that is core to the mission of the park." Most of the elements in this section will be developed by the park staff based upon the vision established in Part 1. Care should be taken to consider diverse audience needs in all planning.

The interpretive program description should consider the following:

Personal Services. This section describes in detail the role that personal services play in providing significance and context to the overall visitor experience.

Non-personal Services. This section assesses the need for interpretive media which includes exhibits, waysides, publications, audio-visual program, and mass and/or electronic media. This section provides cost estimates and future design needs.

Partnerships. This section identifies those involved in the delivery of interpretive services and specifies their role. Partners include: cooperating associations, friends groups, concessionaires, other divisions within the park, other agencies and educational institutions. While partners play a key role in delivering essential programs, they sometime offer us the opportunity to provide enhancements. The plan should provide the flexibility to take advantage of those opportunities. These may include services or facilities appropriate for private sector initiatives.

Library and Collections Needs. This section defines library needs and potential uses of the collection to help achieve the actions of this plan.

Research Needs. This section defines research needs to be developed to support the actions of this plan. It may include liaison work with the Division of Resource Management.

Staffing Needs & Costs. Based upon a clear definition of the personal and non-personal analysis, Visitor Experience description and Goals sections preceding, this analysis will help establish annual and projected budgets. This section also identifies alternative management and funding strategies, and a strategy for acquiring funds for projects.

Implementation Plan. This action plan chart lists those actions necessary to implement the Long-Range Interpretive Plan, assigns responsibility, and sets completion dates. This section is a critical element.

PART 3
Part 3
Appendices

Useful reports, charts, and statistics will be placed in the appendices.

SECTION II
Section II
Annual Interpretive Plan

The Annual Interpretive Plan which replaces the Statement for Interpretation, is based on the Long-Range Interpretive Plan. It is a park document, completed in accordance with the park's budget cycle. This plan should be brief and adapted to park needs. It should contain the following:

PART 1
Part 1
Summary of Annual Plan

This section might be termed an executive summary of the park's interpretive program for the coming year. It is a narrative overview of programs and other activities and should be no more than one page in length. This should be all that anyone should have to read to attain a basic understanding of what interpretation plans to do and why. It is based on the following parts.

PART 2
Part 2
Analysis of Current Program

This analysis reviews the successes and failures of the past year's program as a basis for planning for the coming year. Factors to be considered would include cost, audiences served, interpretive and resource objectives achieved, and linkages to park-wide management objectives and success at reaching expected outcomes. It will be in narrative or chart form, and may contain an analysis using data gathered for the Annual Interpretive Program Report.

**PART
3****Part 3
Management Issues Facing Interpretation**

This is a brief summary of the current issues and concerns (resource management, maintenance, safety, special anniversaries) which interpretation needs to address in the coming year.

**PART
4****Part 4
Annual Work Plan**

This part will vary from park to park. Most park division chiefs submit goals and work plans for each year to the superintendent. Normally, such work plans include actions to be taken, responsibility for each, and due dates. If the division has responsibility for more than one program area, goals for those areas should be included as well. This is a critical element that links the Long-Range Interpretive Plan to the annual operation.

**PART
5****Part 5
New Individual Program Plans**

This part contains outlines for new interpretive programs for the coming year. After the first year the program is offered these plans should be shifted to Section III, Interpretive Database. Parks may use the Individual Service Plan format found in NPS-6 Appendix A, Attachment #5 or develop a new format to meet park needs. This replaces Individual Service Plans.

**PART
6****Part 6
Status of Implementation Plan**

This is an update of the chart found in the Long-Range Interpretive Plan. It shows what parts of the Implementation Plan will be completed in the coming year. This is a critical element of the plan.

**Section III
Interpretive Database**

The Interpretive Database is a compilation of plans, inventories, and reports which are gathered together in one place to facilitate planning. These may include but are not limited to:

**PART
1**

**Part 1
Annual Media Inventory**

A printed copy of the park's portion of the servicewide computerized database describing the condition of interpretive media.

**PART
2**

**Part 2
Visitor Survey Data**

Any survey information which has been gathered about visitors and visitor use of the park.

**PART
3**

**Part 3
Media Evaluation**

Any evaluations or other analysis of programs or media, as applicable.

**PART
4**

**Part 4
Annual Interpretive Program Report**

**PART
5**

**Part 5
Annual Volunteers-In-Parks Report**

**PART
6**

**Part 6
Media Plans**

Individual media plans (museum exhibits, wayside exhibits, audiovisual, publications,) may be included by reference, as applicable.

**PART
7**

**Part 7
Basic Park Reading List**

A list of the information resources most important for a beginning interpreter to know in order to understand the park story.

Note: For convenience, the CIP should be placed in a loose-leaf notebook for easy updating and access.

Interpretive Concept Plans

For more complex parks who share common themes with other parks, or parks that are involved in collaborative operations with other agencies, or for large parks with complex themes and multiple, diverse units, an Interpretive Concept Plan should be developed. This plan will unify planning efforts by identifying overall themes, objectives and shared visitor experiences and recommends the sites most appropriate for their development. These plans should be tailored to the individual needs of the situation, taking into consideration the principles and elements previously described.

Responsibilities

Harpers Ferry Center will continue to have primary responsibility for the interpretive components of management and development planning such as General Management Plans, Development Concept Plans, and interpretive media planning. Interpretive components of GMPs, DCPs and major interpretive facility design will include appropriate portions of the Comprehensive Interpretive Plans. Media planning and design will be based on the goals and other considerations established in relevant interpretive plans. Generally, all planning that involves or affects visitor experience will include interpretive planning.

Comprehensive Interpretive Plans will be collaborative efforts primarily between parks and System Support Offices, with consultation from Harpers Ferry Center or Denver Service Center as appropriate. The process begins with the park Chief of Interpretation identifying a need for a plan. The park superintendent will request assistance from the System Support

Office, the Interpretive Management Group or the Interpretive Leadership Council to facilitate the process.

The roles of the various participants will be agreed upon in the Scope of Work, sometimes called a Task Directive, which is a contract between all players in the planning process. It includes what will be done, when it will be accomplished, who will do it, and what it will cost. Team leadership may be drawn from the park, the Systems Support Office or a National Program Center depending on park staff capabilities and funding.

Who Does Interpretive Planning?

Interpretive planning is led by a planner who is an experienced interpreter. This person should have training in interpretive planning and techniques and competencies, which are demonstrated by strong technical skills as a team facilitator, writing ability, problem-solving and analytical skills, understanding of media applications, interpersonal relations and team building as well as developed interpretive program and leadership skills. Interpretive planners for the Service will include planners in the Harpers Ferry Division of Interpretive Planning and other planners who will be certified on the basis of the above criteria based on a program of formal training and apprenticeship.

Interpretive planners will assemble a team that may include: park staff, staff from other parks in the cluster, Service Center planners and designers, media specialists, subject matter experts, consultants, partners, and the public. All planning begins with the formulation of a Scope of Work which identifies the team members and their individual roles and functions, and the schedule for completion of the plan. The Scope of Work is developed by the planner and the staff of the park, which is both a customer and full participant. Leadership and policy for interpretive planning originates in the Washington Office of Interpretation and Education and the Harpers Ferry Division of Interpretive Planning.

Funding

As there is no single servicewide source of funding for interpretive planning, each Scope of Work will address the issue of funding.

Approvals

Both the Long-Range Interpretive Plan and the Annual Interpretive Plan are recommended by the Chief of Interpretation to the superintendent for approval. Distribution of the Comprehensive Interpretive Plan is at the discretion of the park superintendent.

Appendix

Example of **Comprehensive Interpretive Planning Process**
(please see following page).

EXAMPLE

Comprehensive Interpretive Planning Process. This chart is only an example of a CIP process; **every** interpretive planning effort should be **customized** to the particular needs of the park.

COMPREHENSIVE INTERPRETIVE PLAN

SECTION I — LONG-RANGE INTERPRETIVE PLAN

	Part 1 - Background for Planning	
<i>Produced via Workshop</i> ⇨	Purpose & Significance <i>(Review or Produce)</i>	
<i>Produced via Workshop</i> ⇨	Themes	
	Goals	⇨ <i>Produced by Park Staff</i>
<i>Produced via Workshop</i> ⇨	Visitor Experience Statements	
<i>Produced via Workshop</i> ⇨	Issues & Influences Affecting Interpretation	
	Visitor Profiles	⇨ <i>Produced by Park Staff</i>
	Existing Interpretive Facilities & Media Conditions	⇨ <i>Produced by Park Staff</i>
	Part 2 - Interpretive Program Description <i>(Essential Interp Program)</i>	
<i>Produced via Workshop</i> ⇨	Personal Services	
<i>Produced via Workshop</i> ⇨	Non-Personal Services	
<i>Produced via Workshop</i> ⇨	Partnerships	
<i>Produced via Workshop</i> ⇨	Library & Collection Needs	
<i>Produced via Workshop</i> ⇨	Research Needs	
<i>Produced via Workshop</i> ⇨	Staffing Needs & Costs	
<i>Produced via Workshop</i> ⇨	Implementation Plan	
	Part 3 - Appendices	⇨ <i>Produced by Park Staff</i>

SECTION II — ANNUAL INTERPRETIVE PLAN

	Part 1 - Summary of Annual Plan	⇨ <i>Produced by Park Staff</i>
	Part 2 - Analysis of Current Program	⇨ <i>Produced by Park Staff</i>
	Part 3 - Management Issues Facing Interpretation	⇨ <i>Produced by Park Staff</i>
	Part 4 - Annual Work Plan	⇨ <i>Produced by Park Staff</i>
	Part 5 - New Individual Program Plans	⇨ <i>Produced by Park Staff</i>
	Part 6 - Status of Implementation Plan	⇨ <i>Produced by Park Staff</i>

SECTION III — INTERPRETIVE DATABASE

	Part 1 - Annual Media Inventory	⇨ <i>Compiled by Park Staff</i>
	Part 2 - Visitor Survey Data	⇨ <i>Compiled by Park Staff</i>
<i>Input of Media Experts</i> ⇨	Part 3 - Media Evaluation	⇨ <i>Evaluation Led by Park</i>
	Part 4 - Annual Interpretive Program Report	⇨ <i>Produced by Park Staff</i>
	Part 5 - Annual Volunteers-in-Parks Report	⇨ <i>Produced by Park Staff</i>
	Part 6 - Media Plans (Existing)	⇨ <i>Compiled by Park Staff</i>
	Part 7 - Basic Park Reading List	⇨ <i>Compiled by Park Staff</i>

