

# INTERPRETATION JOURNAL

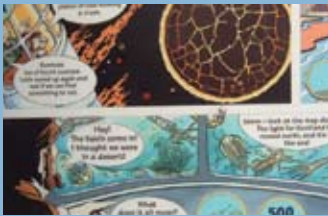


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## Planning for success

Interpretive plans and strategies





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If you wish to submit an article please contact David Masters tel: 0121 441 1198 or email: dd.masters@virgin.net

'Interpretation enriches our lives through engaging emotions, enhancing experiences and deepening understanding of people, places, events and objects from past and present.'

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# FOREWORD: PLANS AND STRATEGIES

An interpretation plan or strategy is rather like an architectural design – an essential blueprint for delivering good interpretation. Plans and strategies are really fundamental building blocks, bringing together all the different elements of a site and its stories to deliver a coherent interpretive experience for visitors.

Interpretive planning is not an easy process. There can be conflicting interests and lack of co-ordination to address. Added to that, the team commissioned to draw up the initial plan may be not the team following it through to implementation – and the original vision is then lost. It is also quite common to find that, when making decisions about what to actually communicate to visitors, stakeholders truly engage with a range of visitor related issues for the first time. In bringing people together, interpretive planning is therefore about delivering process outcomes as well as actionable documents.

In this edition of the Journal we look at both new theories and practical issues in interpretive planning – and with some well judged advice how to avoid pitfalls.

In the first article, James Carter stresses the importance of having someone to orchestrate the work from first thoughts to implementation to ensure the vision is not lost. Bob Jones then describes new ideas for 'issues based' interpretative planning, and how this has informed the interpretive work of the Forestry Commission in Scotland.

Three case studies follow: Yvonne Conchie describes a collaborative scheme in which partner organisations co-ordinate their interpretation through an interpretation framework. Paul Hyde then describes an ambitious project to produce an economic-development led, city-wide Interpretation masterplan for Chester, the first of its kind in Britain. Jo Scott and Rob Robinson reflect on putting into practice the issue-led interpretive planning approach pioneered by Bob Jones.

In the following articles, Sarah Oswald describes how, in light of the new HLF Strategic Plan 3, interpretive planning relates to other aspects of managing, conserving and presenting heritage assets to the public. Maria Piacente describes the production of an interpretation and exhibition design plan for a major new museum in the Caribbean fighting to compete with more traditional attractions - beaches and bikinis. Finally, Tim Merriman and Lisa Brochu explain how interpretive planning in the USA is helping communities articulate and deliver tourism and sustainability goals by unifying diverse interests around the stories to be told.

**David Masters, Commissioning Editor**

# FIVE QUESTIONS

James Carter takes a look at five questions he believes to be crucial in linking planning to implementation.

*'Nothing great was ever achieved without enthusiasm.'* Ralph Waldo Emerson

## THE FIRST THREE QUESTIONS

Many people have tried to define a model for planning interpretation – I saw a PhD recently that cites at least eight different systems, each with their own more or less intelligible diagram. And yet all of them re-work the same basic questions:

*Why are you doing interpretation?  
Who's going to be the audience?  
What are the characteristics of what you're interpreting?*

Different models lay emphasis on individual questions, suggest addressing them in a different order or set up different filters through which to look at the questions. To me, the most important thing is that the three questions need to be taken together. It's only by considering the relationship between them that you can reach a meaningful answer to a final question, *What are you going to do?* If you lay too much emphasis on any one of the three basic questions, the result will be skewed, lopsided, a model that doesn't fit the real world.

'THE AUTHOR, OR THE CREATIVE DIRECTOR, HAS TO FIND HIS/HER OWN "FIT" WITH THE STORIES BEING TOLD, TO BREATHE LIFE INTO THE PROJECT WITH HIS/HER PERSONAL ENTHUSIASM AND CREATIVITY'

## MAKING CHOICES

All of the questions present challenges. Graham Barrow, my colleague at the Centre for Environmental Interpretation, used to reckon that the thinking that goes into a plan, the way the process forces everyone involved to define what they're doing and see it more clearly, was more important than the end result. In many ways I'm inclined to agree. The questions, or whatever variation of them you choose to adopt, may lead you to question your organisation's goals, or at least how its goals can have any real meaning in relation to an audience and their experience of a place. The questions will almost always mean you have to make choices, especially about which stories you're going to tell. That means choosing which stories you're not going to tell, and that can be particularly difficult for people whose lives are dedicated to a place or a subject, and who find it hard to accept that not everyone is going to be as fascinated with it as they are.

## A MISSING QUESTION

But perhaps the most challenging question is one that isn't in the list: *What happens next?* Some interpretation plans take a strategic focus, setting the context for future projects, but leaving the specifications of exactly what those projects will be, or what content goes into an exhibition, to a future piece of work. Other plans are more detailed, specifying themes, objectives and even what the content should be for each intervention on a given site.



RIGHT:  
Knockan Crag interprets  
geology through comic strips.



BELOW:

The Emigration Museum in Bremerhaven, Germany, looks at commonly - held prejudices. Tackling sensitive subjects needs a consistent vision throughout the project.



That's fine, and if the intention of the plan is to lead directly to implementation, the detailed option makes sense. However, I think there are some important questions to ask about how that implementation is handled.

## THE INTERPRETATION MANAGER

At some point in the process of actually doing interpretation rather than planning it, it has to have an author. Most interpretation actually has multiple authors: writers, illustrators, designers, photographers, builders, voice artists, programmers. All their work needs to be coordinated by someone whose job title doesn't appear on any car insurance company's list, and might best be described as *interpretation manager*. His/her role is like that of a director in the theatre: he/she needs a vision of what the project is going to do for its audience, and he/she needs to orchestrate the work of all those concerned to realise that vision.

## BREATHING LIFE INTO A PROJECT

But it's often the case that detailed interpretation plans are seen as equivalent to specifications for fencing contracts: once the plan is done, the whole job can be put out to tender to find someone who'll build it. To me, this ignores the most fundamental quality of good interpretation: the author, or the creative director, has to believe in it, to find his/her own 'fit' with the stories being told, to breathe life into the project with his/her personal enthusiasm and creativity. I believe we need to look carefully at how contracts for interpretation planning are set up so that they take account of this.

**'IF YOU LAY TOO MUCH EMPHASIS ON ANY ONE OF THE THREE BASIC QUESTIONS, THE RESULT WILL BE SKEWED, LOPSIDED, A MODEL THAT DOESN'T FIT THE REAL WORLD'**

## THE FINAL QUESTION

If a plan involves strategic thinking; defining the purpose of interpretation and the sort of projects an organisation wants to pursue, it can stand alone as a discrete piece of work. If it involves developing a creative approach to a site – all the detailed work of thinking exactly what experience is going to be offered to the audience, and how stories are going to be told – it should be indivisible from its implementation. Perhaps what it all boils down to is a question that needs to be asked before any of the others: *What's this plan going to achieve?*

**James Carter is an Interpretation, Communication and Training Consultant.**



ABOVE:

Interpreting geology through comic strips needed clear direction from plan to implementation.

# TELLING THE FOREST STORY

Bob Jones makes a plea for making better sense of an Interpretative Strategy for the National Forest Estate.

If that was the answer... what was the question? Put another way, if 'to raise awareness about forestry' was the objective, and 'trees are central to life' the theme, then what was the issue we needed to address?

If we accept that interpretation sets out to provoke, relate and reveal, we must also accept that objectives and themes cannot simply emerge out of the blue. Nor through the brain-hurting 'twister' games that those so-familiar focus groups indulge in – unless, that is, we have first identified the management issues that needed to be addressed.

The issue in the above scenario is 'How can we harness support for forestry to help tackle climate change?' My proposition is that unless you identified the question in the first place, by going straight to *objective* you are merely immersing yourself in indulgent belief that your subject matter is important. You have given your *theme* no contextual bedrock. And whilst you assert that the subject is important – to you – you have not provided the *entrée* as to why it should be important to others.

## NEW KID ON THE BLOCK

Enter issues-based interpretation (IBI) – the new kid on the block. IBI is an alternative approach to conventional thinking about interpretative planning.

If a tree falls in the forest, does it make a sound if there is no one there? Textbook thinking on interpretation, whilst no doubt wise 'old-growth', has largely drifted to our shores from across the 'pond'. But it does not always 'dock' well with our old world culture and society. Our cultures do differ; our humour, our values, the way we learn, all differ; It follows that we need to evolve our own interpretative philosophies. I do not arrive at this view lightly – it is the conclusion of some 35 years of an often stormy, always bracing, and immensely

demanding voyage through the challenging seas of *interpretation*. And it is the foundation of the thinking behind an Interpretative Strategy for the National Forest Estate (NFE), my parting task for Forestry Commission Scotland (FCS). But this is new thinking only in so far as it endeavours to apply a simple planning ethos and rigour that is hard-wired to business needs and the management processes of a public agency. Why? Because if the interpretation discipline does not mature thus it will not take its rightful place as a contributor to core business and will ever be regarded as a dispensable adjunct, a costly frippery. And the pervading consequence of the latter is that the activity of interpretation is rarely funded adequately so as to ensure excellence – a glass ceiling in need of smashing.

Like all thinking, however, if no one is listening the falling tree makes no sound. Hence the need for a strategy that ensures staff and structures are all pointing in the same direction. No strategy = no plan = dissipation of effort = headless chicken = failure.

## DEEP IN THE FOREST, SOMETHING STIRS

The National Forest Estate consists of some 663,000 hectares of publicly owned woods, forests and associated landscapes – around 7% of the landmass of Scotland. It includes commercial plantations, recreational forests, natural woodland, regenerating native forest, wetland and moorland landscapes – plus a few beaches, lochs and mountains for good measure!

As an agency of FCS, Forest Enterprise Scotland (FES) manages the NFE for multiple benefits – both tangible and intangible. Policy is driven by the Scottish government's *Scottish Forestry Strategy* (SFS). This sets out the vision and challenges for forestry in the first half of the 21st century. It defines seven key themes:

BELOW:  
The interpreter as interpretation:  
a human sundial.



RIGHT:  
Meanwhile, something in the forest stirs...

Climate Change; Timber; Business Development; Community Development; Access and Health; Environmental Quality; and Biodiversity. Implicit is the requirement to *raise awareness* about the role of forestry and the need to encourage people to enthuse about trees and forests and to ensure their value to our society is understood.

It is important that FES addresses the 'raising awareness' objective in a consistent and joined-up manner across its ten regionally diverse management units. Also, that all its operations and activities are seen to *point in the same direction*, reflecting national themes and messages. Topical and 'local' themes will usually 'fit' one or other of the SFS themes. Where they do not, they must be delivered alongside the mainstream messages, subject to the same national guiding principles. Delivering *interpretation* on the NFE that is accessible, purposeful, state-of-the-art, in good order and, crucially, 'joined up' should be the de facto minimum acceptable standard for all staff and employees.

Our strategy 'vision' therefore is to ensure that: Interpretation *'on the NFE will aim to reflect the unique "sense-of-place" characteristics to be found across the forest-scape of Scotland, using such techniques and innovation that will add value to the estate and sustain the FES reputation for high quality'*.

## THE LEGACY

The Forestry Commission, pre- and post-devolution, has had a long and productive association with the use of *interpretation* to further understanding about its activities and the great asset that is the National Forest Estate. Having led the way during the 1950/60s in developing countryside access and recreation facilities, the Commission has, since the mid 1970s, been in the vanguard of interpretation within Britain. It is this legacy

that has led to the evolution of IBI, an approach that in turn is helping to bring the discipline of interpretation into closer touch with mainstream business processes.

However, *interpretation* is essentially a means to an end, not an end in itself. Our strategy must project *interpretation* as a powerful management tool, through which the value of Scotland's forests and forestry industry can be communicated with greatest effect. It will set the scene whereby decisions on objectives, priorities, branding, education programmes, product development, and a host of other management needs and activities can be informed by sound interpretative principles. These are enshrined in Operational Policy Statements:

- *Think global, act local – present national issues in a local context.*
- *Be a champion for quality interpretation – strive to deliver only the best.*
- *Hold 'duty of care' as sacrosanct – the role of steward is a trust.*
- *Be mindful of spirit of place – the past is not a foreign country, it is the foundation of the present, the building blocks of the future.*

**'IF THE INTERPRETATION DISCIPLINE DOES NOT MATURE THUS IT WILL NOT TAKE ITS RIGHTFUL PLACE AS A CONTRIBUTOR TO CORE BUSINESS'**

- *Engage the mind as well as the heart – headlines connect, but take-home moments endure.*
- *Advocate a percent for evaluation principle – if you don't know how you are doing, you are wasting resources.*
- *Connect the dots – network (topics), network (within), network (with others).*

Interpretation must set out to provoke our audiences – they are many and diverse – into thinking about forests, how they relate to our daily lives, and our dependence upon them. This becomes even more relevant as challenges facing society – climate change, biodiversity, health – become key drivers in our evolving environment. *Interpretation's* particular role is to reveal how trees, woods and forests are becoming ever more central in influencing or responding to these issues. Put simply, *interpretation* is the single most important tool in the communications 'toolbox' that can help FES raise awareness and understanding about what it does. And the strategic plan is the hand that wields the tool.

**Bob Jones FAHI is recently retired Head of Design and Interpretative Services of Forestry Commission Scotland.**





# CASE STUDY: PLANNING IN PARTNERSHIP

Yvonne Conchie describes how four separate organisations with interests in Hadrian's Wall have collaborated on a scheme for cohesion and distinctiveness.

## COMMON MISCONCEPTIONS

Nearly every reader will have heard of Hadrian's Wall – but please, let me dispel a few common misconceptions:

- *It's not on the border between England and Scotland* – it runs from coast to coast at our island's narrowest point, through Newcastle city, rural Northumberland and the top of Cumbria.
- *The soldiers weren't all from Rome* – they came from all over the Roman Empire including Gaul, Germania and Africa.
- *It's not a single place* – it's 73 miles long, and is now owned by farmers, home owners, charities, English Heritage and local authorities, amongst others.
- *It's not just a wall* – there are forts, castles, bridges and civilian settlements, alongside sites protected for their geology, ancient ecosystems or lakes from the Ice Age.
- *It's not saved: it's ours to protect* – marching along the top of it makes you feel brilliant, until you twig that you're pushing the stones out sideways.

## COMPETITION

In the iconic central section of the World Heritage Site, where the wall runs through Northumberland National Park, along the cliff of the Whin Sill above the waters of Crag Lough, there are three major projects being developed by four organisations:

- Housesteads Roman Fort (English Heritage [www.english-heritage.org](http://www.english-heritage.org) & The National Trust [www.nationaltrust.org.uk](http://www.nationaltrust.org.uk))
- Vindolanda (The Vindolanda Trust [www.vindolanda.com](http://www.vindolanda.com))
- The Sill, Centre for Wild Landscapes (Northumberland National Park Authority [www.northumberlandnationalpark.org.uk](http://www.northumberlandnationalpark.org.uk)).

These three sites are in a rough triangle with sides two miles long, so there's a real risk of competition and displacing visitors from one site to another. However, there's also a real opportunity to increase the number and length of stay of visitors so that all three sites and businesses in the surrounding area benefit.

'WE'VE DECIDED WE NEED TO "COLLABORATE FOR DISTINCTIVENESS AND COHESION"

## COLLABORATION AND COHESION

To achieve this we've decided we need to 'collaborate for distinctiveness and cohesion'. That is, we need to use our marketing and interpretation to highlight what makes each site special, whilst also emphasising that visiting all three sites is both easy to do and desirable in order to get an experience of the whole story of the wall.

So how are we doing this? The distinctiveness is the easy bit:

- *Vindolanda* is one of the most remarkable of all Roman sites, the scene of annual excavations for the past 40 years, and the origin of 'Britain's Top Treasure' the Vindolanda writing tablets. The project centres on improving access and interpretation across the site and museum to enhance public enjoyment of the excavations, Roman remains and artefacts. It also plans to negotiate a loan of some of the priceless tablets from the British Museum to return and exhibit them at the site where they were found.
- *Housesteads* fort and civilian settlement is in a spectacular location, right on the crest of the crag. If you've been to the wall, this is probably what you visited. This project will make getting around the site easier (it's very steep and uneven), improve intellectual

BELOW:  
Steel Rigg and Crag Lough.



© James Carter



access and enjoyment through layered interpretation, enhance the learning provision for all educational groups and provide visitor facilities appropriate to a World Heritage Site.

- The *Sill* is not about the Romans. It takes Northumberland National Park Authority's role in supporting sustainable rural development and runs with it. A new vernacular green build, hosting an enterprise showcase, life-enhancing learning, exhibitions from the community, a public dialogue about what we need our national parks to be delivering for a climate-changed future, all within an atmosphere of the landscape from wildlife webcams, inbuilt habitats and local produce.

Cohesion is where we've needed help. There are two main drivers: the first is the greater good and more visitors for us all as organisations and for the communities within which we operate. The second is more pragmatic: we are going to the same major funders (HLF and the Regional Development Agency [RDA]) within a short space of time, so we need to demonstrate that supporting all three projects will be their best investment.

Hadrian's Wall Heritage Ltd ([www.hadrians-wall.org](http://www.hadrians-wall.org)), is a company set up by the North East and North West RDAs to support the reinvigoration of the World Heritage Site to help it reach its economic potential for the regions. It works on a number of different fronts: advertising the wall as a destination to visitors as well as managing the Hadrian's Wall National Trail and the Hadrian's Wall Bus. It has also brought our three projects together and encouraged us to commission a joint Economic Impact Assessment to submit to funders. It has also produced an Interpretation Framework for the World Heritage Site which identifies the two topics of frontiers and landscape.

BELOW:  
**Sounding out the Sill.**



© James Carter

## A MEETING OF MINDS

During the recent AHI conference, 62 delegates spent the morning with us on Hadrian's Wall. One group explored intellectual and physical access at Housesteads, a second group looked at the interpretation of Vindolanda and the writing tablets and a third discussed how the design of a building could be used to illustrate the special qualities of Northumberland National Park. We then all came together to air our thoughts on what themes could be reinforced by the interpretation on all three sites.

## GOOD CONCLUSIONS

The Housesteads group found the guided tour of the site to be a very effective way of bringing to life what it was like to be a Roman soldier living at the fort, but were also completely charmed by the landscape setting. Those who visited Vindolanda gave enthusiastic ideas which were really interesting and

innovative for the museum and site interpretation. The Sill group encouraged thoughts about the views of the centre from the road, the views out of the centre to the wall, and how to integrate interpretation through textures and real examples of people and activity out in the landscape. The plenary session where we asked for suggestions on a linking theme was a reminder to keep it simple – we've got the wall, and thanks to everyone's enthusiasm and responsiveness we're also reminded that we're really lucky to have it to share with you all.

**Yvonne Conchie is Engagement Policy Officer with the NNP.**

# CASE STUDY: A MASTERPLAN FOR CHESTER

Paul Hyde explains the process of making a city-wide masterplan.



ABOVE:  
Residents examine the panel  
on King Charles' Tower.

BELOW:  
Chester's Eastgate Clock – arguably the  
most photographed clock in Britain after  
London's 'Big Ben'. But do the public know  
the history of the clock or its site?



## SENSING DEVA

What sense of the past comes to mind when you think of Chester? It might be something about the Romans who named their fortress Deva and perhaps images of 'Tudor' black and white buildings – which are actually mostly Victorian. It might also be the circuit of the medieval city walls, possibly Chester Cathedral or the galleried shopping thoroughfares known as the Rows.

You may have explored the city beyond the main shopping streets (Eastgate and Foregate Streets). However, I wonder how easy it has been for you – and 8 million or so visitors that come to the Chester area each year – to explore and discover the wider historic area?

Such questions set the scene for a major interpretation planning project currently being undertaken in Chester. Funded by the Northwest Development Agency (NWDA) we are producing a heritage interpretation masterplan covering central Chester. This is part of the Chester Renaissance – a programme of developments and initiatives to build on Chester's historic past and make it a must-see European destination by 2015.

## PLANNING THE PLAN

Strategic drivers include the NWDA's economic development and tourism goals as well as the city's marketing strategy. The need for a holistic interpretation plan grew out of the recognition that most such projects in the past had been developed on an ad-hoc basis, often in a response to funding opportunities, and had not necessarily involved proper interpretive planning.

Another consideration was the Chester Culture Park concept, launched in 2006 to encourage visitors and residents to explore beyond the city's heart. The Culture Park considered that the city could be divided into several zones to provide relevant information at key visitor gateways, developing routes of discovery and ensuring a varied events programme.

A detailed brief was produced in 2007, setting out the project's purpose and aims, detailing the key tasks and defining the final output. It also explained why consultants were being employed and how the consultants' response would be assessed. For those of you that work for organisations like local authorities, you'll know that procurement must follow set procedures and the level of complexity depends on the tender value.



## SCOPE AND TASKS

The interpretation masterplan focuses on the public realm, including visitor gateways, for example the station, park and ride facilities, the Rows, city walls, river, canal, parks with historic features and other open spaces. It also links to other projects in progress, or planned, such as for Chester's Roman amphitheatre, the castle and cathedral.

Work to date has included:

- A review of surveys and strategies to establish the audiences expected in Chester by 2015 and consider the characteristics of different segments with respect to interpretation and related experiences (e.g. accessibility, language, interests, media preferences).
- A review of heritage resources both cultural and natural, including geology.
- A comprehensive best-practice audit of all in-situ provision in the city centre, such as panels, plaques and relevant public art.
- An audit of heritage trail leaflets together with an overview of guided tours on offer and three examples of interpretation – the acid-etched zinc panels on the city walls, the Millennium Festival Trail (leaflet and waymarkers) and the Explore the Riverside Promenade Trail leaflet. Together this work will help identify updating implications and inform future media selection and design.

## THE STEERING GROUP AND FORUM

To support the project an Interpretation Masterplan (IMP) Steering Group has been set up with representatives from heritage and visitor economy interests including Chester Civic Trust, Visit Chester and Cheshire, Guild of Chester Tour Guides, Chester Archaeology & Conservation, Heritage Services, Chester Renaissance and the NWDA.

There is also a wider forum of interested parties who are being met separately, including at workshop sessions on developing themes, interpretive events and design-led media.

## THE MASTERPLAN

The aim is to set out design templates for typical in-situ media for key components of the Culture Park and to recommend methods for engaging key audiences within the environmental constraints associated with outdoor provision. Already the Steering Group has recognised that there are too many stories for too many potential audiences, so prioritisation will be necessary.

The masterplan will also need to address issues such as prototyping design-led media, whether panel, leaflet, mobile phone or other devices.

However, the project is helping raise understanding of the complexities of the interpretation process, the breadth of interpretive media and the resources required for effective interpretive provision.

Furthermore, we believe that this project is a first – that no other city the size of Chester has produced such a heritage interpretation masterplan to set out how it will tell its stories to intended audiences across the city. Hopefully the project and the lessons learned, what went well and, perhaps, not so well, will be useful for other cities in the future.

**Paul Hyde is Heritage Interpretation Officer, Chester City Council.**

BELOW:

**Chester based re-enactment group Roman Tours/Deva Victrix Leg. XX animates the area of the Cross over National Archaeology Weekend.**





## CASE STUDY: NO SHORTAGE OF SUPERLATIVES

Jo Scott and Rob Robinson look at developing an issues-based interpretation plan for Kielder Water & Forest Park.

Kielder Water & Forest Park (KW&FP) in Northumberland is a place of superlatives – biggest, most remote, most tranquil, exhilarating, internationally renowned, world-class – so why then did we want to take issue with it when we were commissioned to undertake an interpretation plan there?

'THE ISSUES-LED APPROACH DEMONSTRATES THE NEED AND WORTH OF INTERPRETATION BY MAPPING A DIRECT ROUTE FROM PROBLEMS TO INTERPRETIVE SOLUTIONS'

### PEACE, QUIET AND POTENTIAL

KW&FP is officially the most tranquil place in England<sup>1</sup>, while the village at its heart is reputed to be the most remote. The Park comprises the largest planned forest and reservoir in northern Europe; boasts a brand new state-of-the-art observatory, world-class mountain bike trails and an internationally acclaimed contemporary art and architecture programme. It is also the focus of a massive capital investment programme to create a must-visit destination in this quiet corner of the North East.

### A CLEAR AND LOGICAL PATH

Over the last three years we have worked on seven issues-led interpretation strategies for Forestry Commission Scotland (FCS), developing an approach to interpretive planning pioneered by Bob Jones, recently retired Head of Design & Interpretative Services at FCS (see page 6 for more about Bob and his work). It has been an exciting journey, working alongside Bob and the local forestry teams to hone a fresh approach to interpretation that identifies a series of key interpretive objectives, and that responds directly to visitor and site management issues.

RIGHT:

KW&FP is on a grand scale. There is enough water in the reservoir to give every person on the planet a shower and enough energy in its trees to make it a hot one!



<sup>1</sup> According to the Campaign to Protect Rural England

BELOW:

We used cartoons in the KW&FP interpretation strategy to help sum up the interpretive vision and projects.

The process is pretty straightforward. It follows a clear and logical path from identifying the issues (and the audiences affected by them) through to the interpretive objectives we want to achieve, the main themes and messages we want to deliver and, ultimately, the interpretive projects that make it all happen.

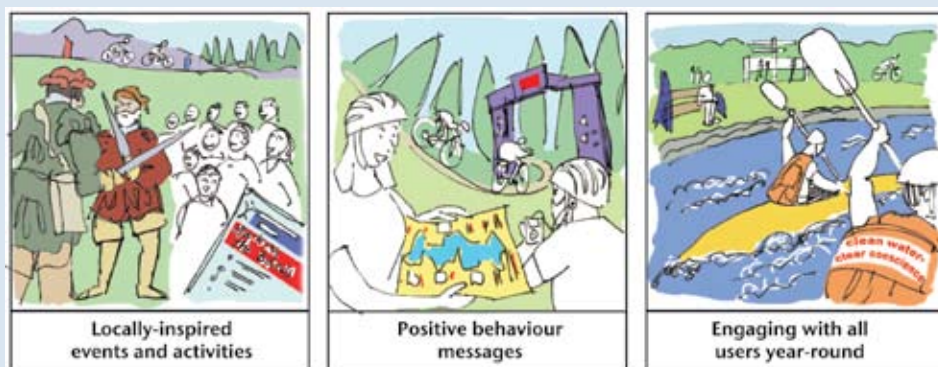
Not rocket science, you might say, and perhaps what most of us do instinctively anyway. What makes this process different is the way in which it directly demonstrates the value of interpretation as a site and visitor management tool. It shows that interpretation isn't just a nice add-on, telling a few interesting stories, but can tackle tricky issues and offer creative solutions for challenging sites. It demonstrates the need and worth of interpretation by mapping a direct route from problem to interpretive solution.

### AN ACCESSIBLE WILDERNESS?

KW&FP is a working landscape, where the weather can be unforgiving and communications poor; it's also a centre for recreation. We demonstrated that interpretation can help give visitors the tools to explore and enjoy this wild land with confidence, identifying a fun family treasure hunt that teaches basic map-reading and navigation skills.

### PRACTICE MAKES... WELL, A BIT BETTER EACH TIME

By the time we were invited by the Kielder Partnership to carry out the interpretation plan at KW&FP, our first issues-based study south of the border, we had already begun adapting our interpretive approach. At FCS Forest Parks such as Galloway, Glenmore and Queen Elizabeth, we had noted the following:



#### • Positive minds

Starting with a site's issues or problems doesn't have to be negative. We've found it's vital to encourage the client team and stakeholders to enthuse about their site and the potential of the interpretive process from the start. With this in mind, we work closely with the site team to explore site weaknesses but also to flag up all the good points, showing how project solutions can build upon the site's strengths and special qualities.

#### TEN BEST THINGS

We held three workshops during our work at KW&FP, bringing Kielder Partnership members, other stakeholders and the community together to draw out real and perceived issues and also to celebrate what they value about the place and what's being done well there. A key outcome is a priority interpretive project that identifies the ten best things to see and experience, which can be used to draw visitors and help them plan their visit. Workshop participants had no trouble in identifying the many things they valued about the place and wanted to share with others!

#### • Justifiably short

A major bonus of this approach is that an interpretive project can be clearly justified, right the way back through interpretive objectives to an issue that a Mrs McSquiggly mentioned at a

stakeholder workshop on a rainy afternoon in October. The question is, how much of this actually needs to go in the strategy – and the answer, we've discovered, is much less than you think. Our strategies are now much shorter, but the appendices much longer. All the workings need to be included, but the main strategy needs to be short, snappy and accessible to a wide range of users.

### A PICTURE TELLS A THOUSAND WORDS

KW&FP is a huge and complex site; as a result we identified nearly 100 interpretive projects for it. To help keep the working strategy concise – as far as we could – we used a cartoon-strip approach to summarise the interpretive vision and range of projects over the next ten years. We've used examples from it here.

#### • Leading by example

A successful strategy requires the whole site team to be involved in the process, including those who will be implementing it on the ground. We've learned that it's not enough to only involve the team in identifying the issues; they also need to be involved in developing the interpretive solutions, to ensure that everyone buys in to the recommendations. And, to make the resulting strategy a practical tool, we include plenty of examples demonstrating how to put the recommendations into action, along with some project briefs (hopefully ensuring our reports don't end up simply as doorstops!).

BELOW:

Installations like James Turrell's *Skyspace* help visitors to engage with KW&FP's landscape and add another dimension to its unique sense of place.

## NOT JUST FOR VISITORS

Local people expressed concerns that developments at KW&FP might change the nature of the place and that they would lose their sense of ownership. We held a community workshop to explore their interpretive ideas and to discuss potential projects by and for local people, including a 'North Tyne Voices' oral and visual history project.

### • Think big, stay focused

The easiest way to follow the issues-led process is to find an interpretive project to address each issue. But the result would be dozens of interpretive projects – utterly daunting for the client team and probably undeliverable. The key is to identify a few carefully targeted projects that address as many of the issues and deliver as many of the objectives as possible. We also prioritise these, to deliver the widest range of benefits over a realistic timeframe.

'IT'S VITAL TO ENCOURAGE THE CLIENT TEAM AND STAKEHOLDERS TO ENTHUSE ABOUT THEIR SITE AND THE POTENTIAL OF THE INTERPRETIVE PROCESS FROM THE START'

## PUTTING KW&FP ON THE MAP

We soon realised that a really good interpretive map was critical for KW&FP. We recommended a versatile, user-friendly map for all stakeholders to use online, in print and on site, which would help address a variety of issues including partnership working, pre-visit planning, welcome and orientation, access, responsible use, and health and safety.



We accept that interpretation cannot address all the challenges in the heritage world, but it can make a considerable, positive contribution towards enhancing both the visitor experience and overcoming management issues. Moreover, taking an issues-led approach demonstrates that interpretation is not just an interesting and engaging (or worse, a resource-heavy and superficial) add-on, but a fundamental, integral tool for resolving all manner of site and visitor

challenges. This is why we 'took issue' with KW&FP – to establish a well-informed strategy that will, hopefully, result in an interpretive experience that also warrants a share of those superlatives.

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# INTEGRATING INTERPRETATION

Sarah Oswald describes the relationship between interpretive plans and other strategies.

Interpretation, as a communication tool which is audience aware and access focused, has obvious links to the plans which, until 2008, the Heritage Lottery Fund (HLF) required of most funding applicants. With the changes under HLF's Strategic Plan 3 and the new guidance for funding applications, the time is right to explore how interpretive planning informs and relates to other plans.

## INTERPRETIVE PLANNING DRAWS IDEAS TOGETHER

During 2007, PLB prepared access, audience development, interpretation and education plans for the Calder Heritage Network Ecomuseum<sup>1</sup> project. Initiated by Pennine

Heritage Ltd, a not-for-profit organisation which works in partnership to develop projects to regenerate and revitalise the heritage assets of the Upper Calder Valley, the Ecomuseum aims to:

*Display, interpret and promote the cultural landscape of the Upper Calder Valley with particular regard to its thousand year history of transition from an agrarian way of life to a thriving industrial society.*

'MAKING OPTIMUM USE OF RESEARCH AND ANALYSIS FROM OTHER REPORTS TO INFORM INTERPRETIVE PLANNING IS COMMON SENSE, COST-EFFECTIVE AND EFFICIENT'

<sup>1</sup> Ecomuseums are 'a dynamic way in which communities preserve, interpret and manage their heritage for a sustainable development' (Declaration of Intent of the Long Net Workshop, Trento, Italy, May 2004). Essentially they are a means of understanding, promoting and enabling access to a sense of place which is originated within the community, but they need not be museums with collections in the traditional sense.

BELOW:

**The Calder Ecomuseum project aims to open up access to the landscape and built heritage of the valley.**



'SHARING CONSULTATIONS GREATLY ASSISTED IN MINIMISING "CONSULTATION FATIGUE" WITHIN THE LOCAL COMMUNITIES, AND ENABLED ACCESS TO A WIDER NUMBER OF STAKEHOLDERS AND POTENTIAL PARTNERS'

The project will enable access to and understanding of the relationship between landscape and community in the Upper Calder Valley through a 'hub' building within Hebden Bridge and the development of walks, trails and events utilising different media, to create 'spokes' within the wider landscape.

Access and audience development were challenging concepts for the client team in this project, as both the process and outputs of these plans were new to them. PLB's emerging analysis highlighted a number of issues for the project including:

- the need to differentiate between potential audiences, and those that should be priorities or targets based on a realistic assessment of existing users, visitor and population demographics;
- the challenges of physical access to Youth House – the building proposed for the Hub – and to the countryside within the steep valleys of the area;
- intellectual access issues surrounding the Ecomuseum concept itself, and what it was actually going to deliver;
- the divergence between the interests of the volunteers who were researching for the project and the needs of the target audiences.

The subsequent interpretation and education plans drew these issues and their solutions together in a form that was tangible and accessible to the client. The plans also showed how the different audiences can and should be catered for, through defining formal and informal learning 'products', understanding

BELOW:

The access plan highlighted physical and intellectual access challenges which could be addressed in part through orientation and interpretation.



who might use the 'hub' and the 'spokes', and developing interpretation that was audience responsive rather than topic driven. The main interpretive message was able to capture, succinctly, the essence of the Ecomuseum concept:

- 'Be inspired by the Upper Calder Valley'
- To discover the Upper Calder Valley is to be inspired by people and places.

Spatial planning of the 'hub' building, accompanied by examples of media which would assist with the physical and intellectual access challenges and be appropriate to the hub and spokes, enabled the client team to see how the step-by-step action plans of both the interpretive, and the access and audience development elements, could be put in place.

Making optimum use of research and analysis from other reports to inform interpretive planning is common sense, cost-effective

and efficient. Having prepared an audience development plan (ADP) for Wigan History Shop, PLB were subsequently commissioned to develop the interpretive designs for the permanent and temporary exhibition spaces. By drawing audiences and learning objectives from the ADP to inform the planning of the exhibition, we can ensure that the exhibition is fully integrated into the aspirations for the whole History Shop facility. But in approaching the project some three years after the first piece of work, we have also tested our original audience assumptions. With the client we identified primary and secondary audiences for the exhibition, as distinct from the audiences for the History Shop's other offers, including formal education, family history research and local history resources.

'IN MANY PROJECTS, THERE IS MORE THAN ONE CONSULTANCY, OR INTERNAL PROJECT TEAM, WORKING ON THE RANGE OF PLANS AND REPORTS THAT ARE REQUIRED'



## SHARING IDEAS AND RECOMMENDATIONS

Integration of interpretation with other plans relies on good relationships and collaborative working. In many projects, there is more than one consultancy, or internal project team, working on the range of plans and reports that are required. Although PLB undertook four of the planning elements for the Calder Ecomuseum, the Conservation Management Plan and Business Plan were being developed by DCA consultants. To ensure sound interpretive planning, as well as balancing conservation and access issues and informing the important financial element of the business plan, PLB and DCA collaborated on consultations and shared reporting as it progressed.

The messages developed for the interpretation drew on the conservation management plan's review of resource assets and significances explored by DCA. In particular, the identification of the significance of *'The human response – both collective and individual – to the environment, the landscape and the area's associated historic and industrial development'*, inspired some of the messages, for example:

### Inspired by change

The people of the Upper Calder Valley can be characterised by their social and cultural response to the growth of industrialisation and their strong sense of community.

### Inspired by you

The landscape and identity of the Upper Calder Valley have long inspired a spirit of creativity, ingenuity, entrepreneurship and a daring to be different.

Sharing consultations greatly assisted in minimising 'consultation fatigue' within the local communities, and enabled access to a wider number of stakeholders and potential partners. In starting the commission, PLB and DCA planned the project programme with the client, establishing deadlines, meeting dates and points of collaboration which enabled this close working and sharing of ideas.

## LOOKING TO THE FUTURE

HLF's new guidance on interpretation reinforces the importance of integration between interpretation and other plans, making specific reference to equal access, addressing barriers

and ensuring universal design approaches.

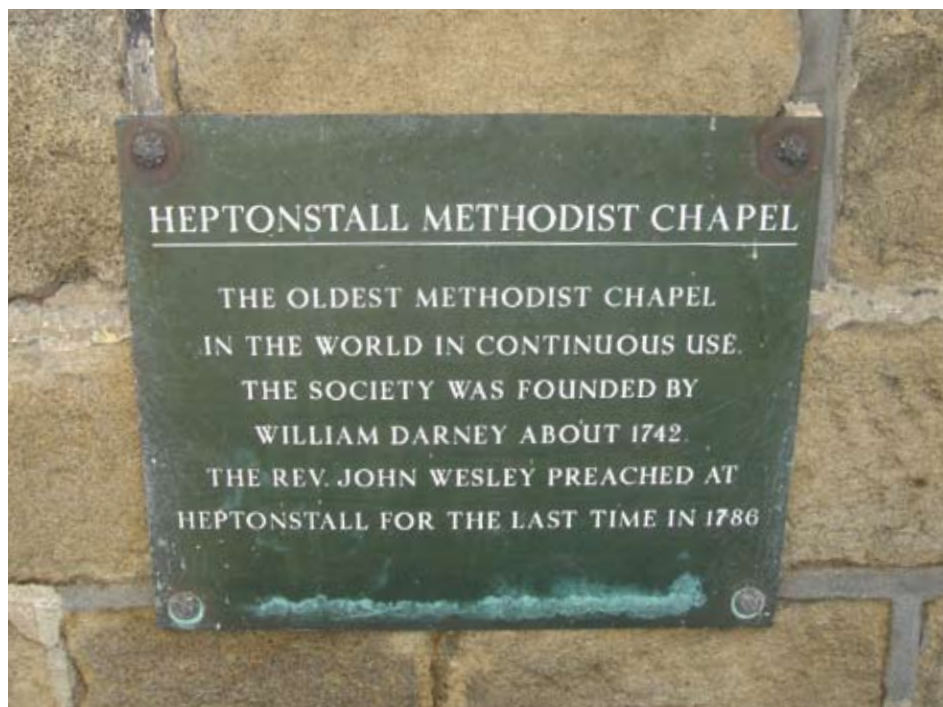
The guidance documents cross-reference each other, for example pointing applicants to 'Thinking about Audiences' guidance when considering audience needs in interpretive planning.

Lessons learned from the last few years of developing and integrating interpretive planning with the full spectrum of other project plans highlight the need to:

- prepare project programmes that promote and enable integrated working, whether within project teams or between external consultants;
- maximise the value of consultations through sharing preparation of and outcomes from focus groups, questionnaires or interviews;
- use and share information between plans to avoid reinventing the wheel;
- draw out significances from conservation plans and statements to ensure that interpretation reflects the values, and visitor management respects the significances identified;
- test and check assumptions, your own and other people's.

Such insights will, for many, be nothing new and should, for all of us involved in interpretation, be ingrained in our everyday work. But it never hurts to stop and remember who we are interpreting for and why, so that we can continue to plan interpretation which delivers for its audiences and enhances the heritage assets it presents.

**Sarah Oswald is Projects Director of PLB. [www.plbltd.com](http://www.plbltd.com)**



LEFT:

It is hoped that Youth House in the centre of Hebden Bridge will be regenerated as a 'hub' to inspire visitors and local people with what the Upper Calder Valley offers including the Heptonstall Methodist Chapel.



# FINDING YOUR VOICE

Maria Piacente discusses the challenges of writing an interpretive strategy for a new museum in Aruba, a Caribbean island better known for beaches and margaritas.



© National Archaeological Museum Aruba.

ABOVE:  
Ceramic Period 'Tinklers'.

In addition to the allure of sandy coasts and endless blue horizons, Aruba is home to a rich cultural heritage. Lord Cultural Resources was hired by the National Archaeological Museum Aruba, to design and build a permanent exhibition for their new location in downtown Oranjestad.

All museum activities, from research and conservation to education and outreach, converge in the very public forum of the exhibition. People go to museums to see exhibitions and exhibitions are as much about the museum as they are about specific stories or collections. But what happens when you are a Caribbean nation, better known for your beaches and margaritas than your history? How do these museums compete and make their voices heard among the hard-working residents and hordes of tourists?

The tiny island of Aruba, administered by the Kingdom of the Netherlands, is located in the south Caribbean Sea, just north of the coast of Venezuela. Together with Curaçao and Bonaire it forms a group known as the ABC islands. A hot, dry climate and a hurricane-free environment make Aruba a very popular tourist destination all year round.

In 2006, the National Archaeological Museum Aruba embarked on an ambitious expansion and transformation project thanks to: the donation of a significant historic site in the heart of Oranjestad; a major grant from UNOCA (Union of Aruban Cultural Organisations); a supportive government; and a committed staff. Not content to simply redisplay the museum's collections in fancy new cases, Frank Croes, Director of the Department of Culture, and Arminda Franken-Ruiz, Project Director, conducted an international bidding process that would bring world-class exhibition planning and design to Aruba. Lord Cultural Resources, an international museum planning and management firm based

in Canada, and Xibitz International, fabricators from the United States, were awarded a contract to design and build 600 square metres of permanent exhibition. Inside the building, designed by Italian architects Studio Bichara, will be modern, interactive and thought provoking exhibits, using a level of interpretation never before experienced on the island. It is envisioned that the new museum will set the standard for excellence in the region.

## THE INTERPRETIVE PLANNING PROCESS

Interpretive planning, at the core of Lord Cultural Resources' design process, revolves around six key stages which can be easily adapted to meet the needs of our diverse clients from around the world.

The research phase of the project involves learning everything we can about the exhibition project and museum – mission and mandate, collections, market, programmes and more. This requires a site tour and in-depth review of the collections. For the Aruban project, our team researched the history and culture of the island and the development of tourism. We visited and interviewed staff from other museums and private galleries to understand the context in which the new museum would operate.

One of the cornerstones of Lord's interpretive planning process is the creative workshop and interview process. These facilitated events involve intense visioning exercises and discussion groups to suss out the goals of a project, communication and learning objectives, stories, themes, collection priorities, and preferred design styles. Archaeologists, community stakeholders, educators, tourism experts, and representatives from the Department of Culture brainstormed over two days to outline a vision for the permanent exhibition for the new National Archaeological Museum Aruba.



© Studio Bichara, Architect

The material gleaned from the interviews, workshops and research is analysed and developed into an interpretive strategy. Also called a 'concept' or 'brief', this report outlines options for framing the visitor experience based on core messages and key learning objectives. The guiding principle for the museum's interpretive plan was that the *'new permanent exhibition at the National Archaeological Museum Aruba will educate and excite visitors both resident and tourist, both indigenous and immigrant about Aruba's rich cultural heritage through a variety of interactive and inspirational experiences. It will educate, motivate and inspire visitors to act – learning, preserving, and respecting this unique heritage.'*

A good interpretive plan is like a script for a movie. It guides the development of the story, keeps all the actors (curators, designers) focused, and ensures that all props and sets (collections, media, designs) are integrated as planned. The interpretive plan breaks down the concept into individual exhibit experiences, assigning collections and other resources as necessary. It describes, in words, what the visitor will do, see, read and experience. It brings education, curatorship and design together, focusing on ways to enhance the communication process. As design identifies the

spatial and visual organisation of the exhibition, the interpretive plan determines the intellectual framework for the visitor.

*Visualisations* bring an interpretive plan – wordy and theoretical – to life. Often misinterpreted as a design concept, visualisations illustrate relationships between themes and topics, a sense of space, and what the experience might look and feel like. Visuals can facilitate the decision-making process and provide wonderful opportunities to share progress about an exhibition planning process with the public, stakeholders and the press in a format that is easy to understand.

*Evaluation* is critical to achieving a transparent process. Inviting feedback from the community ensures that exhibition ideas, stories and designs meet visitor expectations and comprehension levels. Evaluation can take three forms – front-end, formative and summative – each being more suitable at the beginning, middle and end of the exhibition planning and design process. Tools such as focus groups, open houses, interviews, direct observation and surveys can be used to test ideas and the effectiveness of prototypes during and after the interpretive planning stage of an exhibition project.

ABOVE:

**The new building of the National Archaeological Museum Aruba.**

## BREAKING NEW GROUND IN ARUBA

The National Archaeological Museum Aruba presented the opportunity to work on a project that would undoubtedly have a significant impact in a community where museums were low profile and low impact. However, in adapting our interpretive planning approach to the Aruban context, our team had to consider some significant issues.

1. *Non-museum expertise:* While dedicated and highly trained experts in archaeology and education, the staff at the museum did not consist of trained museologists with expert understanding of new trends in exhibition interpretation and design. The Lord Cultural Resources team were considered to be the 'museum experts' and as such it was believed that we would 'tell them what to do'. In order to ensure that we were incorporating the staff's vision and not our own into the exhibition, we needed to address the following issues:
  - Empower the museum staff by increasing the number of opportunities for feedback and review, especially at the interpretive strategy stage of the project. We might be the experts, but this was their museum, their story to tell!

- Ensure meaningful consultation with the Design Committee, a group of experts and concerned citizens established by the museum to participate in the design process. Additionally, we conducted two public presentations to encourage feedback, generate local excitement about the project and maintain transparency.
- Share knowledge with our Aruban peers through training opportunities, not only to the staff of the National Archaeological Museum Aruba, but with individuals from other museums and galleries on the island. We conducted three sessions: Collections Management, Program Development and Delivery, and Interpretive Planning. The training proved rewarding in unexpected ways as it afforded additional opportunities to test interpretive approaches, and create a forum for museum professionals on the island to meet each other and share their experiences.

2. *A sand and sea market:* Most visitors to Aruba come to experience its amazing resorts, shopping and dining experiences; museums are low on their radar. Conversely, the museum receives a lot of resident attendance, especially from school groups. It was critical to ensure the needs of this key market segment and increase resident attendance. As such, the interpretive plan called for a story-driven approach, contextual exhibits, and interactive opportunities that would appeal to a variety of learning styles. While solidifying the experience for the

### 'A GOOD INTERPRETIVE PLAN IS LIKE A SCRIPT FOR A MOVIE'

museum's primary audience was paramount, the tourist market cannot be so easily abandoned. Some 1.3 million people visit Aruba each year (US Dept. of State, Bureau of Western Hemispheres, July 2008). Tourists, mainly from the United States and the Netherlands, have high expectations of their museum visits. They expect to see a superior level of finish, state-of-the-art technology, and rich experiences – all of which have been incorporated into the new permanent exhibition. Capturing even a small percentage of this audience would substantially increase attendance and revenue.

3. *Identity and language:* One of the goals of the exhibition is to celebrate and honour Amerindian heritage and identity. Our interpretive plan called for:

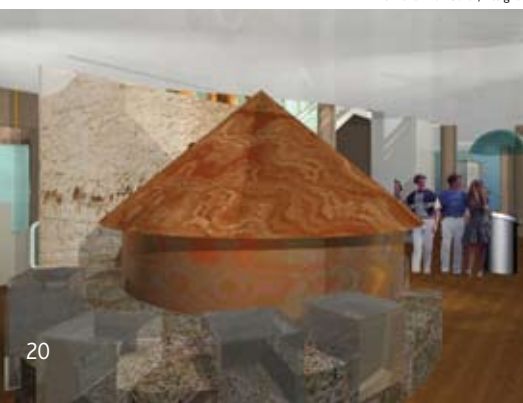
- A decidedly Amerindian perspective on history and prehistory, connecting the past to the present. The first theme that visitors encounter is entitled 'the Past in the Present' – a flexible series of exhibits that explores the Amerindian roots in music, art, biology and more.
- A bilingual presentation, using English and the newly nationalised second language of Papiamentu instead of Dutch. The museum will be one of the first public institutions on the island to do this!
- A thematic and contextual presentation of collections to tell the 'people's story', from the first inhabitants to European contact.
- A display strategy that elevated the collections and stories as sources of pride – a celebration of culture that would appeal to both residents and tourists.

4. *A complex building:* The new National Archaeological Museum Aruba will open in a beautifully restored Dutch-style building that dates back to the 1870s and was once home to Boy Ecury, Aruba's national World War II hero. A two-story structure attached to the complex will house the permanent exhibition and auditorium. Our interpretive planning process had to consider how exhibits might flow from the small rooms in the historic house to the large and modern glass expansion. This was resolved in two ways. First, we developed an undirected and non-linear approach to the organisation of the exhibitions. This will allow visitors to experience the museum from any location and create maximum flexibility not only for design but also for future programming. Second, we identified a sub-theme called 'How do we know/How did they do it?' that would link all the major themes together. This contemporary and scientific perspective ties the experience together.

The National Archaeological Museum Aruba is scheduled to open in January 2009, with a celebration of culture and heritage befitting a national museum. Planning an exhibition in a country like Aruba challenged our team to think about interpretive planning in new ways, such as combining a voice perspective with scientific learning, and developing exhibits that will appeal to a growing resident audience and capturing the attention of a diverse tourist market. Sharing knowledge and museum experience was highly satisfying, and watching the museum staff take more ownership of the exhibition over time has been a rewarding experience.

**Maria Piacente is Executive Vice-President of Exhibitions at Lord Cultural Resources, based in Toronto, Ontario, Canada.**

© Adrian Von Ulrich, Designer



LEFT:  
A recreated maloca exhibit.



# UNDERSTANDING LOCAL STORIES

Tim Merriman and Lisa Brochu explain how an interpretive planning approach can help communities with tourism and sustainability strategies through the development of plans that unify diverse interests in the area around a central theme.

In the midst of globalisation, there is the real danger of communities losing their uniqueness and, consequently, losing their indigenous populations. Providing easy access to mass-produced commodities through the proliferation of international chain stores may be viewed as progress, but this practice is also devouring that which makes a community or region special. In many cases, unchecked growth and undesirable development cause founding families to move on, resulting in town after town looking just like the one before.

## RECAPTURING A SENSE OF PLACE

In the United States, the civic tourism movement, sustainable communities and scenic byways are programmes that are striving to help communities find ways to share their unique stories and recapture their sense of place. Developing a central theme can play a valuable role in coalescing efforts that connect resident stakeholders with their objectives and visitors to the core values of a community, ultimately leading to more sustainable development practices.

## DEVELOPMENT WITH COMPROMISE

*Our Common Future* (1987), a report of the United Nations World Commission on Environment and Development (WCED) defines sustainable development as 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs'. Several communities in the United States have embraced this definition in establishing their own approaches to management of a sustainable community. Sustainable Seattle has been an important leader in this effort through publication of a community grade card for Seattle, Washington, using 'sustainability indicators'. Key indicators were developed by a collaborative group of

leaders and organisations, focusing on the triple bottom line approach to evaluating community progress through social, environmental and economic indicators that provide 'meaningful information to make sustainable choices'.

## COLLABORATION

The growing sustainable communities movement requires a solid definition of success. But that definition may be different for each community, based on its own core values and determination of trends in the areas of ecology, economy and community. Moving toward sustainability requires collaborative efforts among key community players to try to turn negative trends in a more desirable direction. Seattle published *Indicators of a Sustainable Community 1998*, using water quality, voter participation, pollution, energy use, equity in justice, gardening, poverty, renewable energy, salmon populations, ethnic diversity, adult literacy, open space, population growth and perceived quality of life as some of their many areas of interest.

The National Scenic Byways Program emerged from the 1991 US Intermodal Surface Transportation Efficiency Act (ISTEA) as a key strategy for local communities to collaborate along travel corridors. The programme's mandate is 'a grass-roots collaborative effort established to help recognize, preserve and enhance selected roads throughout the United

'IN THE UNITED STATES, THE CIVIC TOURISM MOVEMENT, SUSTAINABLE COMMUNITIES AND SCENIC BYWAYS ARE PROGRAMMES THAT ARE STRIVING TO HELP COMMUNITIES FIND WAYS TO SHARE THEIR UNIQUE STORIES AND RECAPTURE THEIR SENSE OF PLACE'

States'. Since 1992, the National Scenic Byways Program has funded 2,451 projects for state and nationally designated byway routes in 50 states, Puerto Rico and the District of Columbia. The US Secretary of Transportation recognises certain roads as All-American Roads or National Scenic Byways based on one or more archeological, cultural, historic, natural, recreational and scenic qualities. This movement understandably has a strong basis in tourism and has been embraced by many communities as a way of bringing back to life an interest in corridors bypassed by the interstate highway system that deftly dodges small towns that might slow the flow of traffic.



© Lisa Brochu

ABOVE:  
**West Lake, Hangzhou, China. Hangzhou's prosperity is based on its water resources.**

## SCENIC BYWAYS

By 2005 annual grants through this programme had grown to 175 million dollars annually and the legislative mandate had shifted to the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). There are now 125 designated byways in 44 states. America's Byways Resource Center in Duluth, Minnesota, is a Federal Highway

**'AN INTERPRETIVE PLANNING APPROACH CAN SUCCESSFULLY USE CIVIC ENGAGEMENT AS THE KEY TO BRINGING DIVERSE STAKEHOLDERS WITH SPECIFIC INTERESTS TO THE PLANNING TABLE'**

Administration programme that assists grassroots community groups in proposing developing, and promoting scenic byways that pass through their towns. The Resource Center provides information and assistance through their collection of examples of corridor management plans, marketing plans and collateral materials. It also sponsors workshops and training to help community groups interpret the unique resources along their travel corridors. Like the sustainable communities movement, these byways do best when civic engagement and collaborative planning are used as methods of bringing stakeholders together to plan, develop and communicate with constituents.

Civic tourism is a new effort in the US spearheaded by Dan Shilling, author of *Civic Tourism: The Poetry & Politics of Place* (2008). The mission of this programme is to 'reframe' tourism's purpose from an end to a means; that is, from an economic goal to a tool that can help the public enhance what they love about their place.

Civic tourism strategies include:

1. *Rethinking economics*: Urging communities to connect tourism planning to 'restorative' market policies, such as Richard Florida's 'creative economy' and Paul Hawken's 'ecological economics'.

2. *Connecting to the public*: Recommending engagement practices that foster understanding of and support for a responsible tourism ethic.
3. *Investing in the story*: Encouraging a robust conceptual and financial commitment to place-making.

## CIVIC TOURISM

Traditionally in the US, economic interests such as the Chamber of Commerce or Convention and Visitors Bureau guide community tourism development. Civic tourism encourages heritage site managers to get involved with setting the tourism agenda for the community. Investing in the story refers to the need for communities to take better care of natural and cultural attractions such as museums, zoos, aquariums, nature centres and historic homes – the infrastructure that drives people to visit and invest their tourism dollars over and above the restaurant and hotel industries. These attractions create community experiences that tell the stories of the people and places and create a strong sense of place that may not be evident to those simply eating and sleeping on a stopover visit. Tourism is one of the top three drivers in each of America's 50 states, but economics alone should not dominate tourism development and planning.

BELOW:  
**The National Tea Museum in Hangzhou demonstrates the importance of growing tea in China and its reliance on water resources.**

© Lisa Brochu



## CORE VALUES

Connecting to the public suggests that asking people in the community about their core values and what they want to protect in the community helps preserve quality of life. There must be balance between the needs of the people who live in the town and the needs of the people who visit that same town. Consequently, the civic tourism movement also employs triple bottom line approaches and requires civic engagement in planning tourism development.

No one knows the stories of a community better than those who have lived in the area, often for generation after generation. But investing in the story requires careful planning to ensure that stakeholders are working towards a common goal or central message about what makes their community unique. Interpretive planners are well suited to working with sustainable cities, scenic byways and civic tourism strategies, mixing and matching these three approaches as appropriate by using civic engagement as a tool to get stakeholders to communicate about their values and strategies for protecting them. Each of these programmes must communicate with internal and external publics to be successful. All of them are being encouraged by funding sources and current trends in planning to be more outcomes oriented, identifying the measurable results they hope to get from their efforts. Interpretive planners, skilled in the facilitation of stakeholder input, crafting of messages, and development of message delivery techniques to effect specific outcomes, can assist communities in their efforts to meet the challenges of growing tourism demand.

## INTERPRETATIVE PLANNING WORKSHOPS

Interpretive planning is defined as a thoughtful decision-making process that blends management needs and resource considerations with visitor desires and ability to pay, to determine the most effective way to communicate a message to targeted markets in support of the agency's mission (Brochu, 2003). Interpretive planning workshops sponsored by National Association for Interpretation (NAI) have become one of the most popular training services of the association in the US. In recent years, communities or resource agencies associated with nearby communities are more frequently requesting the workshops. A community often wants an interpretive approach to development and communication, but has the challenge of developing themes at the community level without fully understanding the value of their natural and cultural heritage resources. An interpretive planning approach can successfully use civic engagement as the key to bringing diverse stakeholders with specific interests to the planning table. Recent courses in Fort Collins, Colorado; Challis, Idaho; and Ohiopyle, Pennsylvania, have specifically focused on community-based interpretive plans for tourism development that also protects the interests and values of local people. This planning approach involves the development of thematic community experience plans (Brochu and Merriman, 2008) rather than focusing on any one resource or story, to create holistic, rewarding strategies for residents and visitors alike.

**'MOVING TOWARD SUSTAINABILITY REQUIRES COLLABORATIVE EFFORTS AMONG KEY COMMUNITY PLAYERS TO TRY TO TURN NEGATIVE TRENDS IN A MORE DESIRABLE DIRECTION'**

BELOW:

**Xixi National Wetland Park near Hangzhou, offers experiences that exemplify local traditions in making silk, aquaculture and growing rice.**



© Tim Merriman

Using logic models in the planning process guides decision-making and provides an outcomes-based approach to evaluation of implemented community experience plans. These logic models, which describe outputs (what the agency or community will do), outcomes (what the visitor or resident will do), and impacts (benefits to the resource, agency or community), are consistent with the approach of using key indicators in sustainable communities to monitor progress toward sustainability.

## UNDERSTANDING LOCAL STORIES

Even communities who wish to be more sustainable, but who do not want tourism as a major strategy, may be interested in thematic interpretation of their community for the benefit of the residents. Children often grow up with virtually no understanding of the rich natural and cultural heritage in their town. Natural and cultural heritage programmes associated with local museums, zoos or other attractions usually provide school programming that supports statewide standards on education; however, they could also be providing an important way for young people to grow up with an understanding of local stories about people and places. History, geography, civics and biology are often taught in schools without creating real experiences with the local history, geography, civics and





© Tim Merriman

ABOVE  
Hangzhou's sewage treatment plant returns treated water into a demonstration wetland in a downtown park.

biology lessons going on around us every day just outside the doors of the classroom. Natural and cultural heritage sites could be logical partners in any community for bringing home the importance of the uniqueness of the local area. A town that treasures its unique resources and stories is a town that not only survives, but thrives. Interpretive planners can play a key role in working with community planners, developers and leaders on both tourism and sustainability strategies, helping these diverse programmes with convergent interests do a better job of achieving their goals and objectives through developing a community's central theme.

**Tim Merriman, PhD is Executive Director and Lisa Brochu is Associate Director at the National Association for Interpretation, USA.**

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