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COMPREHENSIVE  
INTERPRETIVE  
PLANNING

**National Park Service**

Interpretation and Education Guideline

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# INTERPRETIVE PLANNING



Department of the Interior  
National Park Service

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# PREFACE

## **Comprehensive Interpretive Planning**

Interpretation is about choices. We choose what stories to tell, whom to tell them to, and how to tell them. While these choices are rarely easy, an effective planning system can guide our decision-making and help us to “do the right thing.”

In 1995 the National Park Service adopted a unified planning system for interpretation and education. This system takes proven elements of interpretive planning and, for the first time, combines them as an integrated whole. At the same time, responsibility for interpretive planning has been shifted to the parks.

The decades of the '60s and '70s could be termed the “Golden Age” of interpretive media development in the National Park System. During that period, the National Park Service added a host of new visitor centers and with them new exhibits, films, audio programs, wayside exhibits, historically furnished areas, and publications.

With this new development came increased specialization in planning and design. Interpretive planning, which had been the responsibility of the individual parks, was centralized. Paid with development dollars, the “interpretive prospectus” provided excellent direction for the design and production of interpretive facilities and media. This emphasis on physical improvements, however, meant that personal services planning was left to parks as a separate activity with no particular format.

The tightening budgets of the post-Bicentennial era of the late '70s caused National Park Service managers to question the relevance of interpretive programs then being presented. Some believed that interpreters had strayed from basic park missions in order to “entertain” and to take on larger causes, such as environmental education. Interpreters were challenged by management to show how programs supported basic park goals.

One result of the “back to basics” trend was the development of a new planning format, the Annual Statement for Interpretation (ASFI). It linked programs and services with basic interpretive themes and management goals. Unlike the interpretive prospectus, the ASFI was written at the park level. Like the interpretive prospectus, however, it had to be approved by the regional director.

By the end of the '80s interpretive planning followed two different tracks: the interpretive prospectus served development planning needs, while the ASFI supported annual operational planning. Because of the scarcity of development dollars, a park's interpretive prospectus might reflect an outdated vision for interpretation. While parks could write their own ASFIs, these plans concentrated primarily on the annual personal services program. They were not tied to any broader vision. Because the ASFI format proved cumbersome and time-consuming to produce, many parks stopped using them altogether.

In 1994 a team of interpretation managers, supervisors, and planners began work on a new planning chapter for "NPS-6: Interpretation and Visitor Service Guidelines." In September 1995, this chapter was released servicewide as an addition to NPS-6. Excerpts from the cover memorandum stated:

*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 Comprehensive Interpretive Planning (CIP) process is now established in Director's Order #6 and is the basic planning component for interpretation. The CIP is a tool for making choices. It helps parks decide what their objectives are, who their audiences are, and what mix of media and personal services to use. The product is not the plan, but an effective and efficient interpretive program that achieves management goals, provides appropriate services for our visitors, and promotes visitor experiences.

The responsibility for procuring park interpretive planning now rests with park Superintendents. Instead of waiting for their turn on a servicewide planning list, parks now have the responsibility and opportunity to seek interpretive planning from a broader range of sources: service centers, regional offices, system support offices, other parks, and private-sector contractors.

Although the CIP as defined in Director's Order #6 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. 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 (five to ten years) interpretive goals of the park. The process that defines the LRIP also encourages development of targeted, realistic strategies and actions that work toward achievement of the LRIP goals. Actions divided into annual, achievable steps are reproduced in the Annual Implementation Plan (AIP). Creating annual plans via this "stepping-down" of the LRIP simplifies much of the annual planning process because specific goals already have been identified in the LRIP. The last section of the CIP is the Interpretive Database (ID) which is a compilation of information needed to build the other two components. It includes media inventories, the park's strategic plan, enabling legislation, visitor surveys, reports, a bibliography, and other basic information.

The park should update the CIP as frequently as circumstances require. The CIP should evolve to address new challenges and maintain relevance to park management efforts. By virtue of the NPS management philosophy placing more responsibility at the park level of the Service, park staffs must keep their interpretive plans up-to-date.

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# INTRODUCTION

Interpretive planning is a strategic process which, in its implementation, achieves management objectives for interpretation and education by facilitating meaningful connections between visitors and park resources. Interpretive planning comprehensively analyzes all interpretive needs and determines a wide array of interpretive services, facilities, and programs to communicate in the most efficient and effective way the park's purpose, significance, and themes. Interpretive planning is a goal-driven process that determines appropriate means to achieve desired visitor experiences and provide opportunities for audiences to form their own intellectual and emotional connections with meanings/significance inherent in the resources while protecting and preserving those 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 Strategic Plan identifies park significance and establishes management objectives, including those for interpretation. Building on these, the General Management Plan (GMP) defines desired resource conditions, desired visitor experiences, and any necessary development. Implementation plans, including Comprehensive Interpretive Plans, provide the detail necessary to put the concepts of the GMP into action. Interpretive planning is a vital component of all GMP efforts, Pre-Design Plans, Special Resource Studies, Strategic Plans, and Value Analyses.

Why is interpretive planning important? Interpretive planning serves as the basis for management actions regarding interpretation within a park. Interpretive Planning also identifies key visitor experiences and recommends ways to facilitate them. According to Management Policies Chapter 7 for Interpretation and Education:

*...management plans, CIPs, and other interpretive documents for each park will establish a balance of in-park and outreach interpretive services, based upon criteria such as park significance statements and themes, levels and types of visitor use, the nature of park resources, and park management goals.*

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# BASIC PRINCIPLES OF INTERPRETIVE PLANNING

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 Strategic Plan 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.

Interpretive planning defines a variety of visitor experience opportunities for audiences, both inside and outside the park. 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.

Interpretive planning determines appropriate interpretive services, facilities, programs, and media to communicate in the most effective way the park’s purpose, significance, compelling stories, themes and values, while protecting and preserving park resources. Sound interpretive planning defines desirable and diverse experiences, recommends ways to facilitate those experiences, and assures they are accessible. The outcome of interpretive planning is effectiveness in communicating the park’s story in a larger context, ideas, meanings, and the values associated with the resources themselves, and achieving the balance between resource protection and visitor use and enjoyment.

A person who has demonstrated competencies in interpretive planning will facilitate interpretive planning. Portions of the planning process will be developed by park staff guided by interpretive planners using interpretive planning principles and standards.

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5  
Interpretive planning is flexible, ongoing, interdisciplinary, responsive to client needs, and 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, subject matter experts, and subscribes to the principles of sustainability.

7  
Interpretive planning decisions are based on current research. Decisions regarding 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 is based on a thorough understanding of the most current and appropriate interpretive techniques and services, and draws upon current research and 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, including all media and personal services. The Comprehensive Interpretive Plan is not an accumulation of information, but a solid blueprint for the park's interpretive future. The three principle sections of the Comprehensive Interpretive Plan are the Long-Range Interpretive Plan, the Annual Implementation Plan, and the Interpretive Database.

These three sections of the CIP are covered on the following pages.

### **CIP Section I: Long-Range Interpretive Plan (LRIP)**

This section describes the foundational information that will guide the development of the desired future interpretive program. The long-range vision of the interpretive program and the actions needed to achieve it complete this section.

### **CIP Section II: Annual Implementation Plan (AIP)**

This section is a one-year operating plan for the interpretive program. It is a working blueprint describing what interpretive services are offered to the public this year. It also includes budget and staffing information, actions and challenges, and a comparison of last year's program with this year's program.

### **CIP Section III: Interpretive Database (ID)**

This section contains references to materials that support the interpretive program (such as the park reading list, funding proposals, various reports, etc.).

## **Section I: Long-Range Interpretive Plan (LRIP)**

The Long-Range Interpretive Plan provides a vision for the future of interpretation and education. The projected life span of the Long-Range Interpretive Plan is recommended to be five to ten years. 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 and park partners/community with a facilitator skilled in interpretive and educational planning. It also provides the foundation elements for the Annual Implementation Plan and should be consistent with other current planning documents.

The roles of the park staff, partners, and the planning facilitator will be identified in the Project Agreement prior to the start of planning. The roles will vary depending on circumstances and the abilities of park staff or facilitator.

### ***Part 1: Foundation***

**Purpose and Significance.** This section presents a brief narrative of the legislated purpose of the park and a description of its overall significance. These statements are based on the park's legislative history and Strategic Plan.

**Themes.** Themes define the most important ideas or concepts communicated to the public about a park. They convey the tangible/intangible meanings and universal concepts inherent in the park's resources. They should be expressed in clear statements (usually one or two sentences), and may be divided into primary and secondary statements. Additional information may be added if useful in clarifying meaning. These statements connect park resources to larger processes, systems, ideas, and values. Themes should also be used to define the core content of educational messages that the park offers. These themes are the building blocks on which interpretive services and educational programs are based.

**Management Goals.** Goals describe management's intent in offering interpretive and educational programs and services. They are derived from the park's Strategic Plan. This section may also contain objectives that define specific outcomes for the interpretive and educational programs, such as bolstering community support, building future constituencies, and providing opportunities for life-long learning.

**Desired Visitor Experience.** The description of Visitor Experience relative to interpretation defines how the interpretive process will facilitate a physical, intellectual, and emotional experience based on previously described purpose, significance, themes, and goals. Visitor Experience Goals describe opportunities for the public and suggest how interpretation may change the way the public, including organized groups, will think, feel, or act as a result of their park experience. With regard to educational programs this section describes what educators, teachers, and students will experience when participating in an educational program.

**Issues and Influences Affecting Interpretation.** This section includes long-range servicewide initiatives, influences and opportunities inside and outside the park, resource-based issues, and internal issues that affect interpretation and education.

**Visitor Profiles.** This is a broad description of park audiences and their needs and includes both actual and potential audiences. It should include in-park, out-of-park, and education audiences. When possible, this analysis should depend on systematic surveys.

**Existing Interpretive Conditions.** This brief summary establishes a point of departure for future personal services, media development, and facility proposals. The park's existing media should be inventoried and updated in the Servicewide Media Inventory Database System (MIDS), and not listed in the LRIP.

## ***Part 2: Future Interpretive Program***

This part describes the mix of services and facilities, both personal and non-personal, that are necessary to communicate the park themes and facilitate identified visitor experiences. The elements in this section will be based on the goals and visions established in Part 1: Foundations. Care should be taken to consider the diversity of park visitors, including education audiences, in all planning. There are a wide range of approaches in describing and achieving a park's future interpretive program.

All Future Interpretive Program descriptions should consider the following:

**Personal Services.** This section describes the role that personal services play in providing significance and context to the overall visitor experience. These services are also relevant for off-site educational activities, where preliminary connections are made through individuals rather than places. The potential use of facilities or media for educational purposes (i.e., education centers, residential programs, electronic field trips, etc.) should be explored here.

**Non-personal Services.** This section assesses the need for interpretive and educational media which includes exhibits, waysides, publications, audio-visual programs, mass and/or electronic media, study guides, workbooks, educational kits, and traveling exhibits. This section could include written estimates (that consider potential overhead and are adjusted annually for inflation) and future media needs. Media should allow for multiple points of view to meet the needs of a diverse public, and assessments should be made accordingly.

**Partnerships.** This section identifies those partners involved in the delivery of interpretive services and specifies their role. Partners include cooperating associations, friends groups, concessioners, other agencies, schools, and other educational

institutions. The plan should provide the flexibility to take advantage of partnership opportunities, including 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 identifies research needed to support the actions of this plan. Research should contribute to the efforts to identify “untold stories” within the park. Collaborations between interpreters, educators, historians, ethnographers, scientists, and other park divisions are essential. Research related to analyzing the visitor experience, evaluating the effectiveness of existing media, and post-occupancy evaluation for new media is also important.

**Staffing Needs.** The park’s future staffing and training needs are identified here, including the staff’s participation in the Interpretive Development Program.

**Interpretive Program Costs.** This is based upon a clear definition of the personal and non-personal analysis; 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 lists those actions necessary to implement the Long-Range Interpretive Plan, assigns responsibility, and sets target dates. This section is a critical element; each Annual Implementation Plan (AIP) over the next five to ten years will be based on this LRIP action summary.

### ***Part 3: Appendices***

Only those resources that are referenced somewhere in the LRIP should be included in this appendix section; all other reports, charts, demographics, school profiles, statistics, and other interpretive resources should be placed or referenced in Section III: Interpretive Database (ID).

## **Section II: Annual Implementation Plan (AIP)**

The Annual Implementation Plan is based on the Long-Range Interpretive Plan. It is an action-oriented document, corresponding to the park’s budget work planning cycle. This plan should be brief and contain the following:

### ***Part 1: Summary of Annual Plan***

An executive summary of the park’s interpretation and education program should be prepared for the coming year. This summary should be a narrative overview of programs and other activities, and should be no more than one page in length.

### ***Part 2: Analysis of Current Program***

The successes and failures of the past year’s program should be analyzed as a basis for planning for the coming year. It could include costs, audiences served, and objectives achieved. It may contain an analysis using data gathered for the Servicewide Interpretive Report (10-769).

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### ***Part 3: Management Issues Facing Interpretation***

A brief summary should be written that describes issues and concerns which the interpretive program should address in the coming year such as resource management, maintenance, safety, anniversaries, changes in local school curricula, etc.

### ***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 action, and due dates. This represents a critical element that links the Long-Range Interpretive Plan to the annual operation.

### ***Part 5: New Individual Service Plans***

Outlines for new interpretive programs should be placed here for the coming year . In the following years, these plans should shift to Section III, Interpretive Database. Parks may use the Individual Service Plan format or develop a new format.

### ***Part 6: Status of Implementation Plan***

This is an update of the LRIP's Implementation Plan. It shows what parts of the Implementation Plan will be completed in the coming year. This is a critical link that connects the AIP to the LRIP.

## **Section III: Interpretive Database (ID)**

The Interpretive Database is a compilation of plans, documents, and inventories that are gathered together or referenced in one place to facilitate planning and implementation. At an early stage in the planning process, the park staff is encouraged to begin assembling the Interpretive Database.

This database should include at least the following items:

### ***Part 1: Strategic Plan***

A copy of the park's current GPRA Strategic Plan.

### ***Part 2: Park Legislative History***

A copy of the park's enabling legislation, Presidential Proclamation, or other legislative history.

### ***Part 3: Annual Media Inventory***

A printed copy of the park's portion of the servicewide Media Inventory Database System (MIDS) describing the condition of interpretive media.

### ***Part 4: Visitor Survey Data***

Any survey information which has been gathered about visitors and visitor use of the park. Any data regarding the number and demographics of teachers, students, school groups served in educational programs. Any results from the Visitor Services Card Survey or a Visitor Services Project.

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***Part 5: Servicewide Interpretive Report***

Place a copy of the Servicewide Interpretive Report (10-769) in the plan each year.

***Part 6: Annual Volunteers-In-Parks Report***

Place a copy of the Volunteers-In-Parks Report (10-150) in the plan each year.

***Part 7: Media Plans***

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

***Part 8: Basic Park Reading List***

A list of the books and information resources most important for a beginning interpreter to know in order to understand the park story. This should include educational handbooks, guides, and directories.

***Other Potential ID Components:***

General Management Plan  
Cultural Landscape Report  
Historic Structures Report

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# INTERPRETIVE CONCEPT PLAN

For parks that 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 could be developed. Concept plans unite planning efforts by identifying overall themes, objectives, and shared visitor experiences. These plans should be tailored to the individual needs of the situation, taking into consideration the principles and elements previously described.

# RESPONSIBILITIES

Leadership for interpretive planning originates in the Washington Office of Interpretation and Education and the Harpers Ferry Center's Department of Interpretive Planning; these offices have responsibility for the Servicewide interpretive planning policies and guidelines. Generally, all planning that involves or affects visitor experience will include interpretive planning. This includes the interpretive components of General Management Plans, Pre-Design, media planning, and interpretive facility design and will be based on appropriate portions of Comprehensive Interpretive Plans.

Parks are responsible for accomplishing their own Comprehensive Interpretive Plans through a variety of means. Comprehensive Interpretive Plans will be collaborative efforts among park staffs, regional offices, Harpers Ferry Center, and/or contractors. The process begins with the park Chief of Interpretation identifying a need for a plan to the park Superintendent. Approval of the CIP rests with the park Superintendent.

The roles of the CIP participants will be agreed upon in the Project Agreement which is a contract between the key participants in the planning process. It includes what will be done, when it will be accomplished, who will do it, and what it will cost.

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# WHO DOES INTERPRETIVE PLANNING?

An interpretive planner who is an experienced interpreter facilitates the Comprehensive Interpretive Planning process. This person should be competent in interpretive planning and team facilitation; he/she should also possess skills in writing, problem-solving, team building, and an understanding of media applications and personal service programs. Interpretive planners for the Service will include planners in the Harpers Ferry Center's Department of Interpretive Planning, regional and support offices, contractors, and other planners who possess the requisite skills.

Interpretive planners work with the park to assemble a team that may include: park staff from interpretation and other divisions, staff from other parks, other planners and designers, media specialists, subject matter experts, educators, consultants, partners, and the public.

# FUNDING

As there is no servicewide source of funding for interpretive planning, the park will identify the specific amount and source of funding for accomplishing the Comprehensive Interpretive Plan.

# APPROVALS

The Chief of Interpretation recommends the approval of the Comprehensive Interpretive Plan to the Superintendent for final approval. The Superintendent determines the distribution of the CIP.