



## Interpretive planning

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## Role of interpretive planning

- Purpose of interpretation (see L1 definitions):
  - connect visitors with heritage (by turning phenomena into experiences)
  - make difference in knowledge, attitudes, behaviour
- Interpretive planning is **decision-making process** in order to achieve the purpose of interpretation.
- Unlike in the Czech Republic interpretation is often considered part of corporate communication (national parks, public agencies, NGOs..).

## Decision-making process

- Interpretive planning seeks answers to these questions:
  - What you want to communicate with visitors
  - Who your visitors are
  - What your place is like and what it has to offer
  - What else is happening around
  - What you want to say about your place
  - How, and where, you are going to say it
  - What are the management implications

## History of IP

- Interpretive planning models are starting by the end of 1970s/early 1980s in order to:
  - move from „we do HI“ to „we do quality HI“
  - justify HI costs and effective use of funding in order to achieve objectives
  - deal with competition in the free-time market
  - define roles of different providers in an area (there is just a single visitor's experience regardless of number of providers)
  - get local service providers on-board of conservation

## Planning documents

Several types of documents (often overlapping):  
Interpretive plans, Interpretive strategies, Master (Comprehensive) plans, Interpretive prospectus...



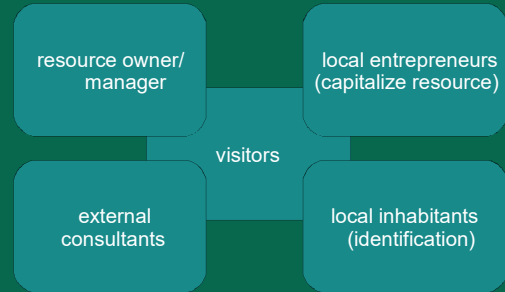
## Interpretation strategy

- framing HI in a region = coordination of plans of different players with management plan
- start synergy by planning together
- point out areas that lack interpretation and/or services => channelling funding
- sets framework for more detail interpretive planning
- can be part of destination management strategy

## Interpretation plan

- deals with concrete methods and interpretive media for an area, museum, phenomenon..
- media, tasks, budget, time-frame
- foundation for funding

## Roles in the planning process



## Task: Compare content of IPs and ISs

- definition of IP subject and methods of IP process
- description of resources (heritage, policies..)
- audience identification & non-audience as well
- audit of current interpretation & services
- definition of key stakeholders
- goals of interpretation
- audience development
- themes
- interpretive media
- suggestions for services provision
- operational capacity for interpretive provision
- action plan
- attachments (research data, resources in detail, photos)

## Methods in interpretive planning

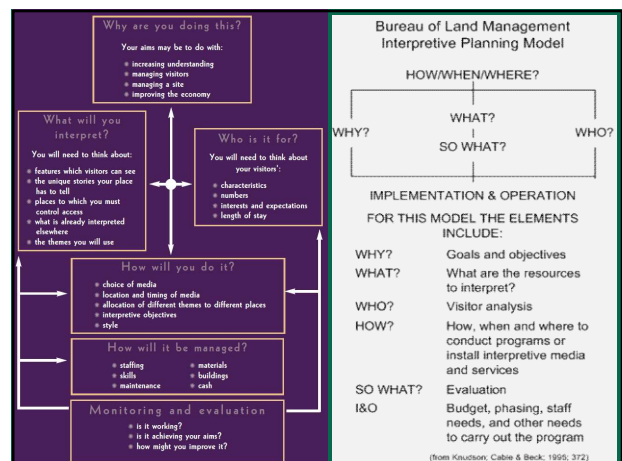
Two main types of interpretation planning methodology exist:

- Process-based:
  - Peart Woods Planning Model (1987)
  - Countryside Commission (1995)
  - A Sense of Place (1997)
- Model-based:
  - David Uzzell
  - 5-M model (2003)

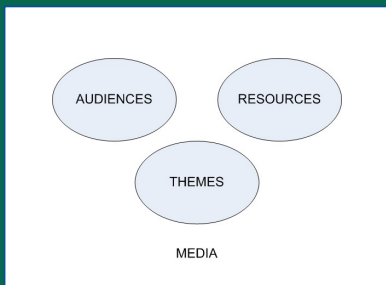
## Process based model (Carter, 2001)

Process methodologies are finding answers to a series of specific questions.

- Why we want to communicate?
- Who is it for?
- What we want to interpret?
- How will we do it?
- How will it be managed?
- How we find out it is working?

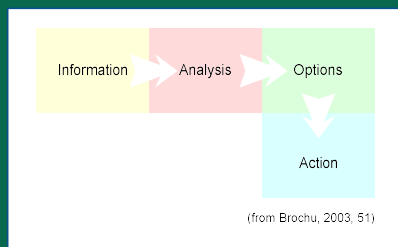


### David Uzzel's model



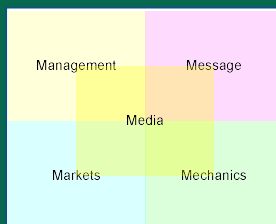
### Model 5M (Brochu, 2013)

Uses standard planning process:



### Model 5M (Brochu, 2013)

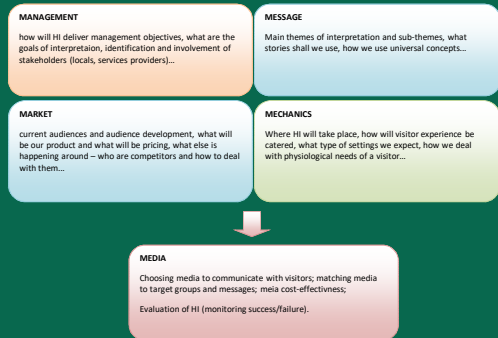
In each stage 4 areas are considered, Media come last after all the other areas were considered =>5th M



### Model 5M (Brochu, 2013)

- Convenient for large infrastructure projects and complex planning in large areas.
- Advantages:
  - builds on standard project planning process,
  - more complex and flexible (takes into account wide range of factors),
  - deals with multiple institutions/stakeholders => mitigates risk in the implementation phase

### Model 5M (Brochu, 2013)



### 5M – acquiring information: Management

- i. sladění interpretace s posláním organizace (proč interpr.)
- ii. definování účelu interpretace = co by měla udělat pro naši organizaci
- iii. cíle interpretace = jaké konkrétní výsledky očekáváme od interpretace (např. v oblasti managementu, PR, ovlivnění návštěvníků) – cíle by měly být stanoveny tak, abychom posléze mohli sledovat jejich splnění
- iv. sladění se stávajícími zákonnými omezeními, návštěvními řády, pravidly managementu atd.
- v. sledování omezujících faktorů: finanční a personální zdroje, provozní prostředky
- vi. sledování zájmu dalších subjektů při interpretaci území – kdo jsou naši podílníci? (místní podnikatelé, provozovatelé atrakcí, krajské a místní centrály CR)
- vii. celková organizace interpretačního plánování a pravidelných revizí úspěšnosti

Information sources
Annual report, corporate plan or documents which set out strategic objectives, Government or other policies, Monument management plan, Budget, Agreements with stakeholders, Staff interviews

## 5M – acquiring information: Market

- a. who is the visitor/client
- b. what is the product (e.g. cave visit is just small part of the whole visitor's experience)
- c. for new venues/installations we ask:
  - i. what are the target audiences?
  - ii. Is the location convenient?
  - iii. is the target group currently present on site, is it reachable?
  - iv. how much time can visitors devote to interpretation?
  - v. What they want /do not want to pay for?
  - vi. where interests of heritage manager and visitors overlap?

### Information sources

Market research, Education/schools catchment data Visitor surveys (if any) Visitor research and evaluation reports (if any) showing use of existing facilities, programmes, attendance at special events etc. Assessment of provision within region (all) /nation (specific)

## 5M – acquiring information: Market

- d. Promotion = how it works now and how it will be developer in the future (up to 70% of our experiences is based on previous opinions)
- e. Competition – who and what is their product
- f. What data shall be acquired about visitors and which way? (amount, way of transport, interests..)

### Out of our bubble

Interpretation is always dealing with whole area or topic – it copies visitor experience, not competences of institutions as there is only single visitor experience. Interpretive planning is not delivering content to, say, educational trail or a visitor centre but interprets phenomena.

knowing what type of information about visitors we will need in the future may significantly influence the planning & provision

be aware of guestbooks – people do not like to give negative feedback => positive FB divide 5, negative multiply 5

## 5M – acquiring information: Mechanics

- a. what is the potential of the place (Am. „resources“), what can be directly experienced and what other resources we have (collections, witnesses), are there limits in using them?
- b. how the infrastructure looks like today and who operates it;
- c. current signage;
- d. what routes are visitors taking (return to one point, linear..) is there grading of their experience?

### Sources of information

Resources to be interpreted; Existing, or planned, facilities, functions, spatial allocations etc. Plans and maps for the context, showing access, existing visitor routes and context constraints (sensitive areas etc.)

Infrastructure is means, not aim of interpretation.

## 5M – acquiring information: Message

- a. What are the most significant natural and cultural heritage stories?
- b. What are visitors interested in?
- c. What does management need to communicate?
- d. What do we know about context of the resource (how it was discovered, how is it managed),
- e. Authentic stories and photos

### Sources of information

Literature, archives, authentic materials, current interpretation, interviews with local experts, story-tellers and persons who still remember...

Example of a method: location of stories on the map => thematic filtering => sub-theme formulation

## 5M – acquiring information: Media

- a. what are current interpretive media(panels, guides, what is provided over the internet, brochures, etc.),
- b. how can visitors access the media,
- c. how good is quality of current media.

### Sources of information

Evaluations and/or audit or current delivery, own research (interpretation delivered by multiple providers)

A to je konec shromažďování informací?

Ne, čím déle v území jsme, tím více toho o něm víme.

Tím, jak oblasti analyzujeme, vybíráme si a prohlubujeme poznání ve zvolených směrech.

## 5M – Information analysis

Analysis => Filter => Selection:

- **Management:** we know what to interpret and why
- **Market:** we know to whom interpret and what is visitors' context
- **Mechanics:** we know what we have and how are visitors using it, we know what we lack as well
- **Message:** we know what we want to communicate and how it will be structured
- **Media:** we know which means of communication we will be using with the audience

## 5M – Information analysis

Analysis might take various forms: consensus, expert focus groups, SWOT...

Analysis might use e.g. current operation analysis, where we look at revenue from activities and compare it with the mission

	vysoké zisky z činnosti		
nesouvisejí s posláním	aktivitu změnit tak, aby naplňovaly cíle organizace nebo držet na dotování neziskových aktivit	pokračovat v realizaci, posílit	souvisí s posláním
	okamžitě omezit	zvážit zvýšení zisků nebo mít jasný zdroj financování	
	ztráta z činnosti		

## 5M – Media

Only when we know what we want to communicate, to whom and why we ask how.

*„When you work backwards, deciding on your media first and then checking to see whether it can be shoehorned into the mission of the site or the budget or visitor interest... chances are good you will end up spending a lot of money for something that does not work very well. Better back up and think through the other 4 M-s before getting your heart set on the latest technological gadget that every other visitor centre is installing” Brochu 2003:65*

Message – Markets – Media Matrix

Market	Education 'X' years	Families	Over 50s
Message			
Sub-theme A Storyline 1	Outreach programme	Trail guide	
Sub-theme A Storyline 2		Visitor centre Exhibit A	Souvenir booklet
Sub-theme B Storyline 1	On-site curriculum		
Sub-theme B Storyline 2	Activity booklet	Activity booklet	Visitor centre Exhibit B(

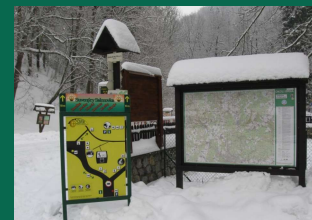
## Key IP methods: Visitor research

- Visitor research – in order to understand our audience we need to understand their typical behaviour (categorization: age, length of stay, visit interests).
- Empirical data are indispensable.



## Key IP methods: Visitor experience audit

- Decision phase (our on-site experiences are largely fabricated by our pre-concepts – up to 70%)
- Introductory phase (orientation, relaxation, planning, decision making, separation from transport experiences, physiological needs)
- Contact phase
- Outcoming phase (sharing experiences, relaxation, reflection, memorabilia, determination)



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