Planning

Our plans miscarry because they have no aim. When a man does not know what harbor he is making for, no wind is the right wind.

Marcus Annaeus Seneca

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Planning

What is it? a systematic approach for preparing interpretive programs

Why do we do it? to create quality programs that meet park needs

How do we do it? review, identify needs, research, and organize information for presentation

Introduction

Creating effective interpretive programs is not simply talking to visitors about what interests you or what you think is special about the park. Planning is key for producing successful interpretation. Even spur of the moment contact with the public should be carefully planned. This involves researching the park and its resources; visitor demographics and motives; management goals and objectives. After this initial research, interpretive themes and messages can be formalized. Additional research may follow. Once understood, interpretive opportunities can be created to meet the needs of visitors and management, as well as maximizing the inherent characteristics and recreational opportunities presented by the resource. The final step is to monitor and provide feedback that improves the product or outcome of the program.

There are several models for planning found in such disciplines as public relations and marketing. These are useful and we will include many of the components of these models in this discussion. Interpretive planning essentially asks and answers a few basic questions: *What do we have in our park? Who is coming and why? What do we need to tell them? What will our facilities, staff, and budget allow us to do? How well did we do?* This module reviews steps in the planning process and discusses how to use them to create successful park interpretive programs.

It should be noted that planning occurs at many levels. It can be done on an agency, district, park, and/or program level. A particularly helpful resource, addressing park-level planning is the *Workbook for Planning Interpretive Projects in California State Parks* (Helmich, 1997). While each level of planning is important, this module focuses exclusively on planning for *personal* interpretive programs.

We will begin by introducing and discussing the ideal approach for planning interpretive programs, if interpreters had the time, the budget, and the ability. Reality, however does not often reflect the perfect world. Budgets are tight, time is limited, and the interpreter's role in the park comes with many responsibilities and duties. We will also present some practical methods and strategies for carrying out effective program planning amid the reality of everyday work.

Steps for program planning

Step #1 - Research resources, audience, and management
Step #2 - Identify themes and messages
Step #3 - Design interpretive opportunities
Step #4 - Monitor and provide feedback

Research

Interpreters must know the park or subject matter before they can prepare successful interpretive programs. The logical first step in planning is to conduct research. Some call this the scoping process. John Veverka refers to it as conducting an inventory. There are three main elements to be considered in the research phase of the planning process: the resource itself, the visitors, and the management. Each element must be inventoried before successful interpretive programs can be designed. In this section, we will review *what* each element is, followed by a discussion of *how* to conduct research on that element.

Resources

- **Why is it protected?**
- **What is so special about the place?**
- **Why is it important?**

Park resources are the basic elements driving the interpretive planning process. They constitute the "interpretive significances" of the park. Natural and cultural resources form the foundation for the interpretation to be conducted in your park. Interpretation is, after all, a communication process designed to help visitors understand the resources. Interpreters cannot connect visitors to resources with which they themselves are unfamiliar. Having the most current and accurate resource information is key for the interpreter, as it promotes credibility with the audience and increases knowledge of the resources.

Resource inventories (unit data file) may exist for the park. Look for them, as current and former staff have compiled valuable observations and research in these files. They can be excellent reference tools. It is likely that you also will develop resource information over time. Your observations should be physically recorded (labeled photos, written descriptions, electronic database, etc.) and kept in an accessible location for other park staff to utilize. Although everyone (staff and volunteers) can contribute to the resource inventory, ideally the interpreter conducting the interpretive programs will be the major contributor to the physical resource inventory. The interpreter is in a unique position to continuously observe the resources and note changes when roving and/or providing interpretive walks. Also the interpreter is primarily the one who will use the resource inventory information to create programs.

On the following pages categories of natural and cultural resources, and common methods for conducting research in each area are discussed briefly.

Natural resources

An inventory of natural resources is a field-intensive activitity that involves observing , identifying, and surveying flora, fauna, and physical characteristics of the place. Seasonal variations in natural resources should be documented. For example, birds found in the spring may be different from fall migratory species. However, some natural resources, such as those associated with geological formations, do not need to be inventoried as frequently. Storms surges, heavy precipitation, wind, and other weather phenomenon may reveal fossil beds, rock outcroppings, and other geological features of an area. Geological aspects of a natural resource inventory should be updated whenever such events take place. Inventories should be conducted periodically and as the resources change.

What is included in a natural resource inventory?

- **Climate** (rainfall, snowfall, temperature, etc.)
- **Scenic/vista points**
- **Park elevations**
- **Dominant vegetation**
- **Primary animals (**terrestrial and aquatic; vertebrate and invertebrate)
- **Rare, threatened, or endangered species**
- **Species of special concern**
- **Water sources in number and size** (lakes, rivers, creeks, ocean, etc.)
- **Habitat types**
- **Unique or seasonal features** (flower blooms, grunion runs, whale or monarch migrations, etc.)
- **Park superlatives** (the biggest, oldest, tallest, etc.)
- **Historical changes in flora or fauna numbers, patterns, and distribution** (non-native species, decline of plants or animals, etc.)
- **Natural hazards or dangers** (poison oak, rattlesnakes, etc.)
- **Geologic features** (parent rock, fossil beds, etc.)
- **Geological development and history of the area** (erosion, soil horizons, rock outcroppings, etc.)
- **Significant geological events** (eruptions, earthquakes, etc.)
- **Relationships between geological, biological, and cultural elements**

Cultural resources

A cultural resource inventory is conducted to determine what significant human activities are found within park boundaries and on adjacent lands. These resources may be as significant as the reason the park itself was protected or they may have been overlooked at frequently visited sites. The surveys need to be conducted as often as those of natural resources, because many are fragile or ephemeral in nature and their conditions may reflect altered maintenance, environmental pressures, and public access. Our knowledge of cultural resources also changes over time. Seasonal events or celebrations - most past and present - should be listed in a cultural resource inventory.

Include facilities and events in cultural inventories.

What is included in a cultural resource inventory?

- **Cultural groups** associated with the park and region - past and present
- **Historic events** and their significance
- **Historic highlights** from relevant cultural groups
- **Significance of park resources for individuals or groups in/near the park**
- **Existing historic structures** (cabins, forts, building ruins, Civilian Conservation Corps sites, etc.)
- **Cultural landscapes** (bedrock mortars, period landscaping, traditional uses of an area)
- **Significant cultural places** (battlefields, sites of historic events, homestead sites, etc.)
- **Transportation corridors** (trails, toll roads, skid roads, railroad right-of-ways, bridges, historic highways)
- **Archaeological sites and associated artifacts**
- **Historical collections associated with the park and its people** (diaries, letters, photographs, furniture, furnishings, tools, equipment)
- **Cultural practices** (daily life activities)
- **Seasonal celebrations and events** (brush dance, battle reenactments, harvest activities, etc.)
- **Historic changes in makeup and distribution of population(s)**

Methods for collecting resource information

When preparing an interpretive program, seek out relevant information that will support your concept. Information can be found through a number of sources. In fact, it is easy to become lost or overwhelmed in the process! Take the best approach when doing research. Organize your thoughts as a working outline. Figure out what you know and what you would like to know for your interpretive program. This may include: the identification of resources—plants, animals, historic sites, building styles, collections; factual points—names, dates, events; resource issues—natural processes, implication of human activities; or cultural perspectives—multiple points of view, cultural practices; etc. By narrowing your search, it will be easier to find the information you seek.

Review existing documents and ask people knowledgeable about the resources to determine if the information has already been collected. This will save time and may lead you to new or existing sources of information about your subject.

Sources of information:

- Current and former park staff
- Unit files and unit histories
- Historians, biologists, archeologist, etc.
- Historic Structures Reports
- General Plans
- Interpretive Prospectus, Interpretive Plans
- Furnishing Plans
- Department Resource Inventories
- California State Parks Photographic Archives
- Park and local libraries
- Local and regional museums, historical societies
- California State Library
- California State Archives
- Books, research journals, newspapers, Internet, etc.
- Scope of collections statement
- Teacher's guides
- Artifact collection reports
- City, county, or state property records
- California State Parks Archives
- University libraries

When collecting resource information, remember there are basically two types of data–primary and secondary. Primary materials are derived *from* an actual event. Secondary materials generally are *about* an event. Primary sources are considered by historians to be more reliable than secondary sources of information. An example of a primary source is a U.S. census record with the specific information from individuals in a household (names, ages, occupations, etc.). A secondary source would be a biography written about someone in a household. Both may contain good information, but the biography may have intentional or unintentional elements of bias. In gathering materials for an interpretive program, it is important to be as honest and as objective as possible. Do not assume the material you are examining is factual, tasteful, logical, well-designed, organized, up-to-date, unique, or typical of the period. Also remember, not everything has been recorded or saved.

Research

Some information for an interpretive program may need to be gathered on site. Reviewing previous inventories and research efforts will help to promote familiarity and knowledge of the park's resources. Develop regular procedures for conducting your research. Be sure to keep track of authors, titles, dates, record books, etc.—any details about the information and where it came from. Record the data you collect in a systematic manner. Be neat! You or someone else may have to refer to this information again.

Tips for collecting primary data

- **Visit** the site at different times of the day, week, month, and season
- **Use** a camera to photograph and note special or unusual resources, photograph from several perspectives
- **Record** and date all observations and label photographs
- **Note** conditions under which observations were made
- **Take** care not to alter any historical or cultural resources
- **Use** field guides to verify species, architectural details, etc.
- **Call** in an expert if identification is in question
- **Indicate** any resources too fragile to withstand visitor use or traffic

Tips for collecting secondary data

- **Apply the rule of three**– Try to avoid using information in a program that cannot be verified by three different original sources. This reduces the potential for inaccurate or misinformation in programs. However, sometimes there is only one source.

- **Use current sources–**Utilize the most up-to-date information. Science is changing and theories develop as scientists test and learn new facts. Current information and perspectives on historical events evolve. Be aware of the dates and perspectives of your sources.

- **Know the source–**Part of evaluating the credibility of information is to understand the source of the information. Is it from a reputable source? What makes it reliable? Perspectives may differ widely on issues, facts, science, and history and how they may impact the slant of the story.

- **Use caution when utilizing the Internet–**Anyone can create a website. There are some great sources available on the computer, such as peer-reviewed journal articles, university search engines, etc. The key is to seek out the credible sources of the information.

- **Keep good notes**–Record the source of your information. Keep notes from your research in an organized, consistent and systematic manner. The information you gather will create usable data for present and future interpretation.

> ***If you fail to plan, plan to fail.***
> James Fazio and Douglas Gilbert

Audience

- **Who** is coming?
- **Why** are they coming?
- **What** do they want when they get here?

An important element that must not be overlooked in the research phase of program planning is your audience. They are our *market* and the primary force behind interpretation. Our programs must meet the needs of our constituents and visitors. There are many "audiences" to consider. The visiting public and the local community are two of our primary concerns. We will discuss each one in this section.

First, in order to meet their needs and satisfy their expectations, we must know who is coming and why, as well as who is *not* coming and why (Veverka, 1994). We should find out if an audience segment's uninvolvement is due to a lack of services, facilities, programs, or outreach (Knudson, Cable, and Beck, 1995). When we understand what motivates their visit, we can examine what they do in the park. This information will enable us to create and deliver more effective programs. Let us review the primary aspects of an audience, as well as recommended methods for conducting research about them.

Who is the audience, and why are they here?

The visiting public: who is coming?

Analysis of our visiting public includes an examination of demographics, motivations, activity participation, and use levels. Each of these will be discussed followed by a section on methods and sources for collecting visitor data.

Demographics

Demographic data can be very useful in program design. Consider how your program offerings would vary if your visiting public were primarily families with young children versus adult groups with no children. What if the majority of your users were elderly? The educational levels of your audience can impact the information included in your programs. A visitor's place of residence and previous site experience, as well as prior knowledge about the site, the resources within the park, and the history and culture of the area will affect how your program will be received and therefore how it should be planned. Cultural associations or ethnic background information can be helpful in deciding what interpretive facilities, programs, topics, and recreational opportunities should be offered.

Helpful demographic data

- **Gender**
- **Age**
- **Group structure** (family, adult groups with no children, single, etc.)
- **Place of residence** (local versus non-local, in- versus out-of-state, foreign, etc.)
- **Education level**
- **Cultural or ethnic identification**
- **Previous site experience**

Motivations

Information on visitor needs, expectations, and motives for visiting can be very useful in preparing programs that meet needs and satisfy expectations. Understanding what motivates visitors to come to parks and seek out interpretation will enable you to use the best strategies and methodologies for reaching your audience. There has been a lot of research conducted on why visitors come to parks and natural areas. We have synthesized this research and formed some basic categories of visitor motivation (See Table 4.1). Consider how each of these motivations would impact your program design.

Motivations for visiting parks — Table 4.1

- **Curiosity**–Many visitors simply are curious about something that they have heard, seen, or read about. These visitors are primed to be "turned on" to the park and its resources. Usually their expectations are not specific and their needs are typically not well formed. They are more open than visitors with specific expectations.
- **Meaning**–Visitors often come seeking meaning. It comes in many forms. Social meaning includes paying homage to natural wonders or a cultural heritage site; gaining a sense of nationalism; or exploring family history and roots. Other meanings are highly individualized, arising from personal experiences, memories, special events, spiritual associations, or eras in one's lifetime. For example, a park might hold special memories because of a high school class visit.
- **Socialize/belonging**–Most visitors come in groups, seeking social experiences that are rewarding, gratifying, and nonjudgmental. Most visitors assume that others probably share similar values, beliefs, and attitudes. This makes the social experience a rewarding one. Programs with activities that allow visitors to talk to one another and share their experiences help fulfill this desire to socialize.
- **Escape**–Some visitors come as a means to escape everyday work, stress, stimuli, etc. They seek sensory input that is apart from their usual day. They desire natural or cultural stimuli that are slower, more predictable, or different than their usual surroundings.
- **See the real thing**–Many parks have attractions that draw visitors to "come see it for themselves." For example, many visitors who come to the redwoods are motivated to "see the trees for themselves." Similarly, historical and cultural sites often draw visitors who want to pay homage to a significant place, person, event, or thing.
- **Enjoyment**–Many visit just to have a good time. Interpretive programs should always strive to increase visitor enjoyment of their recreational experience.
- **Esteem/confidence**–Some visitors are motivated to "prove themselves" through a recreational experience. They like to match competency levels with challenges and seek situations most likely to provide a rewarding experience. Advertisements of these programs should indicate the level of difficulty for an activity. This is an essential component for visitors motivated to build esteem or confidence.

Use and activity patterns

Another aspect regarding the visiting public is to understand what they do and where they go when they are in the park. This is relatively easy and useful data to collect. Park use levels at trails, parking lots, visitor centers, boat ramps, contact/entrance stations, etc. should *all* be included when gathering data. This information is beneficial for showing time, location, density, and frequency of visits. *Park use level* information can be consolidated with *program use level* data to paint a fairly accurate picture of visitor activities in the park.

Inventories should also be conducted on how visitors use their time in the park. This information can be employed to tailor programs to meet specific activity preferences. "Visitation use patterns allow you to see when your site and services are most in demand" (Veverka, 1994, p. 53). For example, if 50 percent of users ride bikes, offering an interpretive bike program would likely meet visitor needs. Perhaps you have heard an interpreter say something like, "We cannot reach our users with programs because they are all out on the lake during the day." Instead of being viewed as a barrier to programming, this information would suggest that some of the programs should be conducted on the lake.

Survey your audience for their needs.

Methods for collecting visitor data

Collect basic information on park visitors in one of two ways: primary and secondary data collection. There are two primary data collection methods: observation and self-report. Observation data involves watching visitor activities in a setting to determine use patterns and demographics. Simple observation will identify visitor-use types, but not necessarily their motivations. Self-report data collection asks visitors questions and their replies provide the information. Each method has negative and positive characteristics, depending on who is collecting the data, who the target audience is, and how the data will be used. Let us review each collection method.

Observation

Observing visitors is informative. The challenge is to pick days and times randomly to observe the place, activity type, etc. Focus on one place, activity, or attraction at a time. A goal of observation is to identify use patterns over time. You must observe the phenomenon long enough and at a variety of times in order to accurately identify use patterns. In addition, you must be discreet. Visitors who think they are being watched may change their behavior.

Program attendance is easy to calculate and priceless when it comes to understanding program-specific patterns of use. Over time, you will see variations in attendance, depending on the time, day of the week, program topics, etc. This information is invaluable for modifying program offerings. Basic demographic data, combined with attendance levels, can paint a very useful picture of the target audience for each program.

Check-em out!

- **Count license plates or state decals on cars.** This can give some indication of how far visitors have traveled and may indicate their level of previous park experience.
- **Collect information on the basic group structure of visitors coming to your programs.** This is most easily done in a parking lot before the group splits up to participate in different activities. Make categories ahead of time to save time and *discreetly* collect the information.
- **Conduct trailhead counts to determine the number and types of users.**
- **Observe visitor center use patterns, frequency and flow to identify which exhibits/signs are the most popular, how traffic flow can be improved, and when most visitors are in the center.** Perhaps a roving presence would be valuable for this data collection.

Self-report

There are many types of self-report data collection methods. We will review many of these methods in detail in Module 12-Evaluation. One of the most commonly used self-report data collection methods is surveys. All survey data is self-report data because we are asking the visitor to give us the information. The following is a brief overview of survey methods useful for collecting demographic, use level, activity type, and informational needs data.

Have a specific pattern of randomly asking visitors, e.g., every fourth visitor through the gate. This provides a more unbiased, representative sample of the population of users in the park. Use mostly closed-ended questions that ask the visitor to check a category rather than to write in an answer. This type of data is the easiest to tabulate. Open-ended questions allow visitors to write in individual responses, but are very time consuming and difficult to tabulate. However, these questions are very useful for informing us of issues, concerns, etc. that we may not understand enough to create a category for a closed-ended question (e.g., Where did you spend most of your time in the park?). Use open-ended questions, but use them sparingly (e.g., How did you spend your time in the park?).

Survey design

- **Keep total length of surveys short and simple**
- **Use jargon-free questions**
- **Be sensitive to visitor privacy**
- **Have several clipboards available**
- **Provide a drop box at the exit for visitors**

Secondary data collection regarding visitor demographics, use, and motivations involves utilizing information that has been previously collected and compiled. "Information may already be available on your target audiences through local and state government statistics on family/household expenditures, life-style groups, and trends in the marketplace; chambers of commerce; and specialized publications on marketing, which provide information on interests and attitudes of different groups." (Helmich, 1997, p. 13) Although perhaps not as accurate a reflection of users as primary data, secondary data sources may provide good information and be the first choice for interpreters. The main reason to use secondary data is the ease of acquiring it. It is quicker, cheaper, and requires less skill and expertise to collect than primary data. Using secondary data is often the practical option for many interpreters.

Another helpful technique

Your first trip - Knudson, Cable, and Beck (1995) recommend using *your* first trip to the park to begin to understand the visitor. This only works in the first week or so on the job, so do not miss the opportunity. When you first arrive on site keep notes.

- **What do you notice first?**
- **What attracts your attention?**
- **What needs do you have as you enter the park?** e.g., restroom, campsite, orientation/assistance
- **What, if any, are your immediate safety concerns?**
- **What features in the park do you want to explore first?**

Many of the things that you noticed or were of concern to you will also be in the forefront of visitors' minds.

The local community: who is *not* coming?

An important question to ask when assessing local public needs for programs and services is, *Who is not coming*? We want to be sure that participation is not because of the lack of appropriate facilities, programs, or services. Trying to assess who is not coming is a very difficult task. The only practical way to answer this question is through the use of secondary data collection about the local general public. This can also be asked of potential visitors from outside the area.

There are two benefits for conducting this type of research. First, by using census data and local (county, city) statistics about the population, it can be determined if park visitor demographics match similar numbers represented by the nearby community. This information is a good indicator of which groups may not be using park facilities. The second key benefit is to inform you of the characteristics of your local community. Conducting an examination of the nearby residents will help identify the needs of the community that your park's programs may not be meeting. Interpretation in the form of school programs, outreach events, and other special off-site activities can then be targeted to reach out to people who may not be visiting the park.

Methods for collecting local community data

The methods for collecting this type of data are similar to those previously mentioned. When you conduct a primary data collection survey of the local public, include items such as: 1) current activity participation levels and types; 2) demographic data; 3) needs and skill level information; 4) attitudes, beliefs, and values regarding relevant issues; and 5) management preferences, opinions, and issues. Generally staff resources and skills necessary to conduct such a public survey are lacking. That is why the use of secondary data sources, such as the Federal census, almanacs, and social indicator data, are the most common methods for obtaining data on the local population.

Community outreach includes school visits.

Management

As noted in the introduction to this module, management must be included in the research phase of the planning process. To create interpretive programs that support management goals and objectives, you must know and understand them. In addition, a review of the park's current methods for communication, topics covered, facilities, trails, and locations used for programming is essential. Considering these elements will help to ensure the appropriate use of resources in concert with the overall mission of the agency.

The organizational philosophy

Knowing the purpose and guiding philosophy of the organization will determine the overall direction of the interpretive services provided by the park. "A philosophy is a framework which reflects the values and beliefs of an individual or organization" (DeGraaf, Jordan, and DeGraff, 1999, p. 58). An organization's philosophy is made up of mission, vision, goals, and objectives statements. Remember from Module 2-Purpose and Value that all interpretation should meet or address a management goal.

The legal charter of California State Parks, as required by the Public Resources Code and the California Code of Regulations among others, calls for it to:

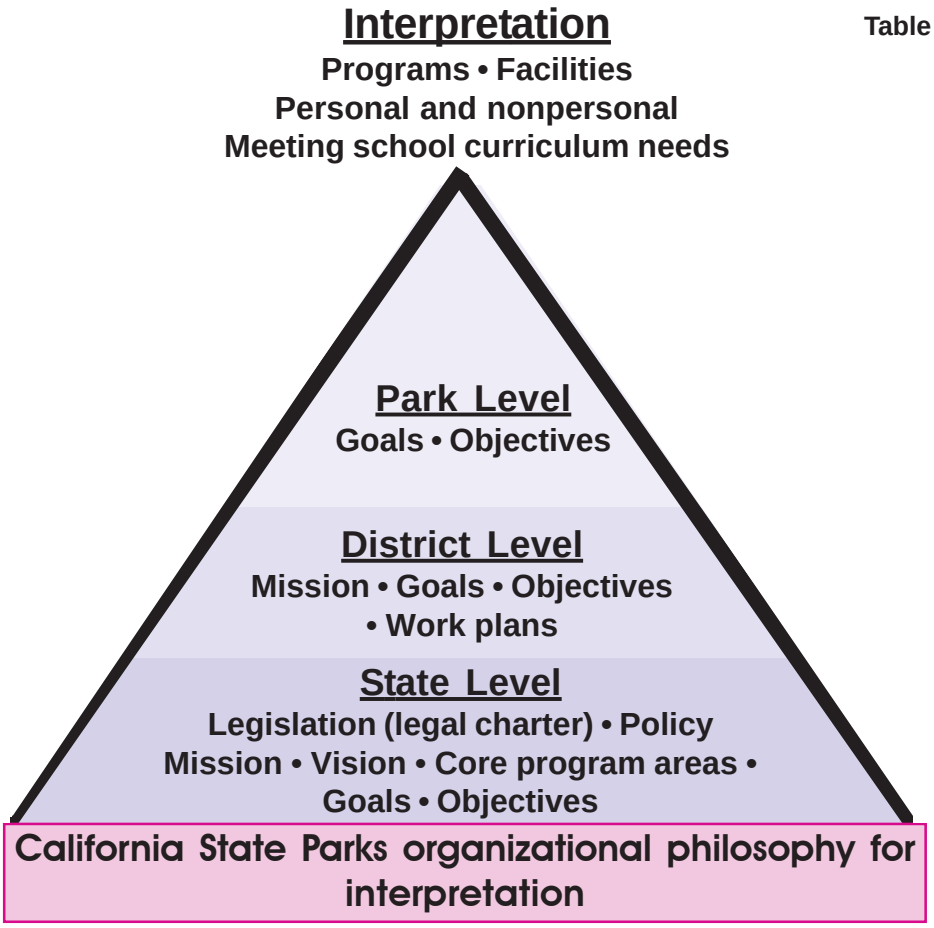
> ***…administer, protect, provide for recreational opportunity, and develop the State Park System; to interpret the values of the State Park System to the public; to operate the Off-Highway Motor Vehicle Recreation Program; to administer the California Historical Resources Protection Program; and to administer federal and state grants and bond funds to local agencies.***
>
> The Seventh Generation

A mission statement was developed from the original legislation that created our Department . **"The mission of the California Department of Parks and Recreation is to provide for the health, inspiration, and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and creating opportunities for high-quality outdoor recreation."**

The mission of the organization states the values which express the enduring ideals, or beliefs, shared by State Parks' employees. A vision is also part of the organizational structure, guiding programs within parks. A vision outlines future goals and aspirations.

Organizational philosophy guides the California State Park System. Within this structure, each individual park may also have its own goals and objectives that fall within the overall mission, vision, etc., of the Department (Table 4.2). Effective interpretive programs understand and convey the mission and vision that forms the basis of the organization's philosophy. Actual written organizational philosophy varies from park to park. On page 4-19 (Table 4.3), we will review some of the main sources for mission, vision, goals, and objectives statements.

Table 4.2



Current program offerings

After the guiding framework for interpretation has been reviewed, the current status of interpretive services should be examined. This encompasses what is offered, when, where, and for whom. When determining what programs should be created, it is imperative to ask, what has been done? How many walks are provided versus more sedentary programs? How many evening programs versus day programs? How many children's programs? At a minimum this inventory should be conducted for the previous year of programming. Ideally evaluations of prior years should be made to prepare data on the current status of program offerings. This information essentially provides an overview of the interpretive programs in the park. Once this information is collected, categories of data will begin to emerge.

Some categories to examine include: time of day, day of the week, program length, topic of program, location, program type (slide, hike, talk, etc.), target audience, and historical attendance levels. A final component is to identify what park goals and objectives are addressed by each program. This will enable you to see which goals and objectives are not currently being addressed and which ones may be overemphasized. These will then guide the choices for programs to be offered in the future. We will discuss this in more detail later in this module.

Visitor centers are facilities that enable interpretive programming.

Facilities, equipment, resources, and supplies

When determining what interpretive programs to conduct in your park, check the facilities, equipment, resources, and supplies that currently exist in the park that may be of use for programs. Is there a visitor center? What about an amphitheater? How many people does it seat? Is there a facility to show slides? What type of interpretive equipment and supplies do you have? Do you have a facility to conduct programs protective from inclement weather? These and other questions are critical for determining what types of programs you can offer and where. Together they form the infrastructure supporting interpretation. For example, developing an interpretive slide program would not be a very appropriate approach if there was no facility in which to show slides or if there was no equipment available to use for the program.

Inventorying the tools of the trade

- **Facilities** - Physical structures in the park (e.g., campfire center, visitor center, trails, historic buildings, classrooms, etc.)
- **Equipment** - Typically things that can be used over and over again (e.g., slide projector, screen, camera, computer, video/DVD player, sound equipment, etc.)
- **Resources** - Not as durable as equipment, but not as quickly consumed as supplies (e.g. field guides, props, slides, period attire, etc.)
- **Supplies** - Things that can be consumed (e.g., glue, tape, film, etc.)

An important aspect of the infrastructure is the financial resources available to supplement or replace existing equipment and supplies. Know what the interpretation budget is for your park. Plan ahead for needs. At the end of the fiscal year if funds become available, do you have a list of your needs ready? Is there an interpretive cooperating association working within your park? These nonprofit associations can assist interpreters by acquiring needed equipment and supplies.

> ***It's easy to come up with new ideas; the hard part is letting go of what worked for you two years ago, but will soon be out-of-date.***
>
> John Veverka

Methods for collecting management data

One approach for collecting management information is to seek data from existing documents, including the park's general plan, interpretive perspectives, interpretive plan(s), DPR 918s, management documents, enabling legislation, equipment inventory lists, and year end program summaries. They can be helpful in determining park management issues relevant to interpretive programming. Additional data can be obtained about current management issues, existing facilities, and equipment by talking with District Interpretive Coordinator or Interpretation and Education Division staff. They can help you identify statewide and regional goals and objectives. Personally taking inventory of existing equipment and facilities is another way to collect primary data about park management resources.

Each park is unique and has different guiding management documents, recommendations cannot be made regarding specific information sources. For example, not all parks have an interpretive prospectus outlining goals, objectives, and themes. These documents provide detailed information for park interpretive programs. Some parks may only mention interpretation in their overall park management plan while others may have established a district interpretive planning team. It is your job to find and assess the documents that guide the interpretive services in your park.

Sources of organizational information	Table 4.3
• Park specific legislation • Organizational philosophy • District mission statement • General plan and amendments • Interpretive prospectus/plans	• Park/program goals and objectives • Scope of collections • Strategic plan • Unit files • DPR 918 and DPR 461

Identifying themes and messages

After research is conducted, the second step in the planning process is to determine the message that should be delivered to the public. Your research should have revealed what is special about the resource, why it was protected, what the management objectives are, and who is/is not coming. This information provides the structure for creating the messages that should be delivered and how they should be targeted. Themes and messages may exist for the park in interpretive planning documents (see example on the next page). However, themes and messages may not be readily identified in any park literature. In these cases, it is up to you, the interpreter, to create the themes and messages that clearly meet management goals and objectives, provide for visitor enjoyment of the resource(s), and promote visitor and resource protection.

Module 5-Programs details how to write effective messages and themes. However, in the planning phase, the specific wording and formatting of themes and messages is not important. For now, it is only critical to identify overall messages.

- **What** are the important messages about the park that should be conveyed to the public?
- **What** stories should we tell?

Designing interpretive opportunities

- **How** should messages be provided to the public?
- **How** can programs best meet park goals and objectives?

The next phase of the program planning process is to determine how interpretation will be provided in your park. Once the basic research has been conducted and primary messages and themes identified, consider how to deliver the messages to your target audiences that will also meet the overall goals and objectives of the park. Review the example provided below of how an interpretive opportunity should be created to meet a management goal, using the planning steps discussed thus far.

Putting it all together: Creating an interpretive opportunity

Step 1 - Research

- **Natural data** - Tide pool animals were identified and populations calculated and reviewed for resistance and resilience to handling by visitors. It was found that sea anemone numbers declined drastically during heavy visitor use months.
- **Visitor data** - Surveys revealed that most visitors to the park come to see and experience the tide pools. Only 14 percent of the visitors attended formal tide pool interpretive programs.
- **Management data** - The tide pool resources were one of the primary reasons the park was protected. Two formal programs per week are conducted on tide pools, and this is when resource protection messages are currently given.

Step 2 - Themes and messages

One of the primary messages outlined in the park's management plan is that visitors need to understand the fragile nature of tide pools. Given the research that indicates a resource management problem-the sea anemones are disappearing-the message that tide pools are fragile resources and need to be protected is identified as a park priority.

Step 3 - Interpretive opportunity

Given the low attendance at the current tide pool programs and the continued damage to the resource, an interpretive opportunity is needed. To convey the desired message, we should schedule a roving (see Module 10-Roving) presence on site at the tide pools during peak use hours and days.

Program goals and objectives

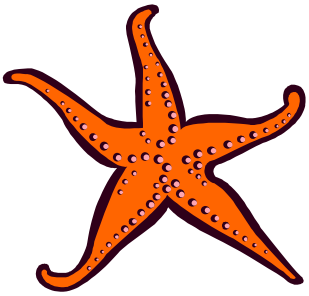
The previous example demonstrates how the steps of the process begin to fit together to assist in program planning. Once program goals are outlined, then it is time to develop objectives and identify target audiences. In the previous example, the program's goal is to protect the fragile tide pools from visitor abuse. Just as with park objectives, specifically outline how program objectives goals will be accomplished.

Objectives for interpretive programs may fall into three categories: behavioral, cognitive, and affective. Thinking back to Module 2-Purpose and Value interpretive programs should influence behavior (behavioral objectives), increase knowledge levels (cognitive objectives), or reach emotions (affective objectives). Park needs and goals often determine the types of objectives programs target. An interpretive program can target all three objectives simultaneously. Let us take a look at an example:

Goal: Protect the park's tide pools

- **Behavioral objective -** In June 2003, resource inventories conducted during a week with roving interpretive programs will show a 50 percent reduction in sea anemones dislodged from the tide pools when compared to a week without a roving on-site presence.
- **Cognitive objectives** - In June 2003, when exiting the site, 50 percent of randomly surveyed visitors exposed to on-site roving will be able to correctly identify two ways to protect tide pool resources.
- **Affective objective** - In June 2003, 50 percent of visitors exposed to on site roving park tide pool programs will indicate positive support for tide pool protection.

Assessing program objectives.



Writing objectives: a step-by-step approach

Objectives should be specific, time limited, measurable, and have clearly stated standards. The most common problem encountered when writing objectives is not making them measurable. Objectives often end up very similar to goals if measurement is not carefully considered. This is one of the most important considerations when writing an objective. If it is not quantifiable, the evaluation of a program's success is difficult, if not impossible.

The acronym WAMS will assist in writing good measurable objectives. It stands for **W**hen, **A**udience, **M**ethod, and **S**tandard. *When* will the evaluation take place? Who is the target *audience*? What *method* will be used to evaluate success? And what is the *standard* to measure success or failure? Using the WAMS method prevents writing objectives that are not measurable.

Writing program objectives - WAMS

- **Identified message -** The remaining coastal redwoods should be protected and preserved.
- **Program goal** - Create a program that increases awareness of and support for the preservation of the redwoods.
- **Program objectives–**

Objective #1: During a quiz on the hike back from an interpretive walk, at least 50 percent of visitors will be able to identify two reasons why redwoods should be protected.

When = during the hike back
Audience = visitors
Method = a quiz
Standard = 50 percent will identify two reasons why redwoods should be protected

Objective #2: When offered a Save-the-Redwoods League membership application at the end of the talk, at least 10 percent of visitors will take one.

When = end of the talk
Audience = visitors
Method = offer a membership form
Standard = 10 percent will take one

Target audiences

Another element to consider when designing interpretive opportunities is the target audience for the program. This is the part of the planning process that pulls everything together. For example, the information collected during the research phase of the planning process will indicate the kind of audiences that typically attend various programs, what the characteristics of the local population are, and what populations are not currently being addressed through program offerings. This information will be used to help identify target audiences for future programs. Although we do not often limit programs to certain audience types, we can do some things to promote participation by certain groups. For example, the time of day programs are offered would impact whether or not local families would be able to participate.

Influencing the audience

- **Where programs are advertised**
- **How programs are advertised**
- **When programs are offered**
- **Where programs are conducted**
- **Program topics**
- **Program length**
- **Program type** (walk, slide talk, etc.)

Using the elements in this box, think about how local families with children could be targeted for a program. Although certain groups may be identified for programs, those that attend are often not predictable. With this in mind, programs should always be created with enough flexibility to be conducted for an "average" audience consisting of families with children, adults with no children, a mixture of males and females, and a fairly even age spread among the adults and children.

There are some *special* audiences to consider when designing programs. These audiences introduce special concerns, needs, and issues. Teenagers, children, elderly, and people with disabilities are among some of the groups of special concern when program planning.

Teenagers

Teenagers are a special group because of their emotional, cognitive, and social developmental stage (Grinder and McCoy, 1985; Knudson, et al., 1995). A primary concern for many teenagers is how their peers perceive them. They are very self-conscious and do not like to be singled out for attention. Most of the time when they attend programs they are "too cool" to play. Connecting with teenagers is very important because they are in a formative cognitive developmental stage. It is in this stage that basic belief systems can be influenced and molded through the presentation of information.

Do not address teenagers as children. It is important that they be asked their opinions, feelings, and thoughts about things. Many teenagers are still treated as children by their primary caregivers, so interpretive programs that enable teenagers to express adult thoughts in an adult setting will be well received. Try to avoid too much lecture-like material. Instead, provide opportunities for open-ended discussion and problem-solving tasks. Knudson, Cable, and Beck (1995) recommend that programs be designated specially for teenagers. It may be easier for them to feel like adults when not surrounded by their parents or guardians.

Elderly

The population of recreational participants is aging. Currently about 25 percent of Americans are over the age of 50 and 12.4 percent are over the age of 65 (US Census Bureau, 2002). With the baby-boom population aging and the average life-span increasing, it is expected that by 2025 the median age in the United States will be 41. Projected trends in recreation, such as a decrease in backpacking and an increase in bird watching, reflect this population shift in age (Dwyer, 1993). The older adult population is more sophisticated, typically has more free time, and is more physically fit than in years past. This population is generally influential, votes, and is economically able to participate in recreation. Three primary concerns should be addressed when designing programs for elderly adults: mobility, hearing, and vision. Geiger and Ellis (1991) indicated that the three most common ailments for seniors are arthritis, hearing loss, and visual impairment.

Generally, interpretive programs targeted for elderly populations should be conducted as short walks on flat or gently sloping trails or as talks with no walking. Programs should take into account the years of experience of the participants and provide opportunities for them to contribute to the program. Socializing opportunities are important for these visitors. Speak loudly (but do not shout) and clearly. Use objects, large graphics, and visual aids to illustrate your point. Avoid asking the audience to read small print. Be sure you know what assistive listening devices are available in your park, and always announce to visitors the opportunities to use such devices (see *All Visitors Welcome*, Porter, 1994).

Children

Children pose unique challenges and opportunities for programming as well. Junior Ranger and Junior Lifeguard programs in many parks provide special interpretive opportunities for children. We will review children's interpretation in detail in Module 9-Kids!. In keeping with the above discussion of special groups, what makes children a unique population for interpretive programming is their level of cognitive, physical, social, and emotional development. As Tilden said in his sixth principle of interpretation, "Interpretation addressed to children (say up to the age of twelve) should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. To be at its best it will require a separate program" (Tilden, 1967, p. 47). Children have short attention spans, a great deal of energy, and an enormous potential for absorbing facts and information.

Incorporate as many of the senses as possible when developing programs for children. Programs should be hands-on, involve tangible objects, and stay centered around the physical resource. Programs should incorporate play, fun, and imagination. Analogies, stories, games, role-playing, and questions are all helpful strategies to use with children. The main goal is to *engage* them in the topic of the program. Because there is huge variability in dealing with children at different age levels, specific recommendations will not be made in this module. For example, a successful program for 3rd graders would not work well with 6th graders. We will review children's interpretation in detail in Module 9-Kids.

Physically Disabled

As of the 2000 census, almost 50 million Americans have some sort of disability. In California that figure is roughly 6 million. These individuals are members of the public we serve in California State Parks, and have the right to be able to access our programs and services. In 1990 the Americans with Disabilities Act (ADA) was passed. This legislation legally requires leisure services providers to facilitate and support the full participation of individuals with disabilities in all leisure programs. ADA impacts programming in California State Parks in various ways. For example, ADA requires that a sign language or oral interpreter be hired any time one is requested in advance by a visitor. The California State Parks is in the process of complying with the spirit of the ADA. California State Parks may not refuse to allow a person to participate in a service, program, or activity simply because that individual has a disability.

One of the principles of ADA is that "special" programs are not the desired solution. In fact, programs should be made to be as inclusive as possible. "Separate but equal" is not the intent of the ADA. *All Visitors Welcome* (Porter, 1994) provides several suggestions for conducting programs for those with disabilities including changing as little as possible from the original program, involving the person with disability in the modification process, and not making assumptions regarding preferences for modifications. In the end, maintaining the dignity and rights of the individual should always be the primary concern. Be sure to know what facilities, equipment, and services are available in your park to assist those with disabilities. Refer to *All Visitors Welcome* for more information on requirements and suggestions for making your programs and park accessible for everyone.

- **Was** the program inclusive?
- **Were** the programs successful in meeting goals and objectives?
- **Did** we succeed?

Monitoring and feedback

The final stage of program planning is monitoring and feedback. This brings the process back full circle to the research phase. Although we dedicate Module 12-Evaluation to discussing monitoring and evaluation, it is important to discuss it here to clarify that evaluation is part of the planning process. It should not happen as a separate function, but as an integral part of the program-planning process.

Monitoring is essentially asking whether or not you have met the program objectives. Monitoring and feedback should inform you of the current status of program offerings based on program objectives, and offer suggested modifications and changes for the future. This data is then used as part of the research for the next cycle of programming. Monitoring and feedback are a critical stage in the planning process.

It is through these activities that assessments can be made about meeting goals and objectives. If the planning process does not have an evaluation phase, then there is little indication of the success of the planning efforts.

Monitoring and feedback techniques and strategies should be based on the program content, goals and objectives, budgets, expertise, target audiences, media used, and the time frame available for feedback. Veverka recommends a six-step sequence for the evaluation process.

1-2-3-4-5-6 steps for evaluation

1. **Identify the objectives that you need to evaluate.** This should be done when the program is created.
2. **Select the most appropriate evaluation tool or technique.** This is discussed in detail in Module 12 - Evaluation.
3. **Conduct the evaluation.**
4. **Compare results to the desired objectives.**
5. **Analyze results, assessing why or why not objectives were met.**
6. **Make recommendations for improvement.**

What's ahead

Now that you have a firm grasp of the planning process needed to create interpretive programs, let us turn to a review of the basic interpretation program itself. You have the background and understanding of interpretation needed to begin the process of planning and creating your own programs. The next module will review the basic elements of an interpretive program and take you through the steps of creating a program.

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Planning

Self assessment

Answer each question in the section below before reviewing the material in Module 4-Planning. The answers are not provided. Check your answers with your colleagues and as you read Module 4-Planning. Items from the self assessment may be reviewed and discussed in class.

1) What are the basic steps of the program planning process?

2) What are three primary elements that must be researched when planning for programs?

3) What is a unit data file?

4) Is primary data collection mainly conducted on site or off site?

5) Which of the following is a source of primary data?
   a) Personal observations
   b) Reports from park staff
   c) Unit files
   d) Interpretive prospectus

6) What is the "rule of three" regarding secondary data collection?
   a) Read each source at least three times
   b) Find the information repeated in at least three different places
   c) Look three times for information
   d) Use three different sources for the information

7) When researching the public, it is important to know who is not coming to your park.
   a) True
   b) False

Self assessment

8) Which of the following is one of the primary motivating factors for individuals to visit parks?
   a) Cheap vacation
   b) Sense of nationalism
   c) Location
   d) Ease of transportation

9) Which of the following is a good reason to use secondary data regarding visitors as opposed to primary data?
   a) Provides greater detail
   b) More current
   c) Quicker and easier to collect
   d) More relevant

10) All interpretive programs should somehow address a management goal or concern.
   a) True
   b) False

11) Specific, measurable statements that guide programs are called:
   a) Goals
   b) Objectives
   c) Vision
   d) Core program areas

12) When designing interpretive opportunities for the public, which of the following should **not** be a primary driving force?
   a) Target audience
   b) Program and park goals and objectives
   c) Themes and messages
   d) Personal content knowledge

13) Projected trends predict the largest population of park visitors will be (if it isn't already):
   a) Children
   b) Teens
   c) Men mid-30s
   d) Elderly

Self assessment

14) In California, approximately_____ people have a disability.

a) 500,000
b) 1 million
c) 3 million
d) 6 million

15) Iinterpretive programs should be created for visitors with disabilities. (Explain your answer.)

a) True
b) False

16) Evaluation is a critical phase of the planning process. (Explain your answer.)

a) True
b) False

17) What are three possible objectives of interpretive programs?

Now that you have completed the self assessment questions, review the material in Module 4-Planning to confirm your answers. After reading the module, move on to the workbook learning activities, which will assist you in developing your skills.

Workbook learning activities

To help you review and apply the material covered in Module 4-Planning, a selection of review questions and/or activities is provided. Again, no answers are included. Use the material from the module, outside sources, and your colleagues to help you complete the activities and answer the questions. There may be more than one right answer. Use the questions and activities to generate discussion about the material. Be prepared to discuss, perform, or demonstrate your answers in class.

1) What are some practical things you can do the first week on the job to become acquainted with the three primary aspects of the research phase of the planning process: the resource itself, the visitors, and the management?

Resource:

Visitors:

Management:

2) Is primary or secondary data more accurate? Why?

3) Write two cognitive objectives for a program targeted at local school children with a goal of educating them about the importance of park protection.

Take it to your park

Answer each question with the information specific to your park. You will have to conduct some research in order to answer each question. Use the answers as a guide for beginning your career in California State Parks.

Planning

Park name_____

We learned in this module that research is one of the most important aspects of the planning process. Unfortunately, there is often little time to conduct meaningful research. Take time as your training progresses to fill in as much of the following as possible. This is only a start to discovering the park's resources, visitors' characteristics and needs, and management's needs, goals, and objectives.

Answer each question about your park and indicate the source where you found the data.

1) Natural resources

List two different types of rock.

Name two non-native species found in or around your park.

List two amphibians or reptiles.

What is the most serious or critical animal or plant management problem?

What is the dominant form of vegetation?

What are the major changes in plant and animal life in the last 100 years?

What is the dominant vertebrate?

Which plant and which animal pose the most danger for humans?

What are the key pieces of literature written about the flora and fauna of your park?

2) Cultural resources

What cultural groups live in or near the park?

What are the significant cultural or historic events that took place in or near your park?

List any significant cultural or historic places or features.

List the existing historic structures in the park.

How has the local culture in and around your park changed in the past 100 years?

Are there any living relatives or descendants of the historic cultures? List them.

List key resources written about the local culture or history of your park.

3. Management

What are the major guiding documents for interpretation in your park? When were they written?

Are there existing goals and objectives for interpretation in your park? Briefly summarize them.

What types of programs are offered to the public?

Take it to your park

What facilities in the park can be used to support interpretive efforts?

Create a list of the current interpretive equipment in the park.

What primary interpretive themes and messages are currently delivered in the park?

4. Visitors

What types of information are there regarding visitors to your park?

How was the information collected?

When was the information collected?

Take it to your park

Indicate the general demographic characteristics of visitors to your park (gender, age, place of residence [local vs nonlocal], education level, cultural or ethnicity identification, etc.).

Is there any data regarding attendance levels for specific programs? What does it reveal?

What are the demographics of the local population in the area around your park? (Local reports and data from the Chamber of Commerce, census data, etc., can help you answer this.)