

Practice-based Perspectives on the Interpretive Planning Process

Leonor A. Colbert

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Committee:

Kristine Morrissey

Leah Ceccarelli

Anita Verna Crofts

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Leonor A. Colbert

University of Washington

Abstract

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Leonor A. Colbert

Chair of the Supervisory Committee:
Kristine Morrissey, Lecturer
Museology

Due in part to its idiosyncratic nature, interpretive planning is routinely described as both an art and a science; existing literature puts forth a significant body of guidelines, however, little research describes the gap between literature and practice. The purpose of this research was to describe how interpretive planners navigate the gap between the guidelines put forth in the literature and practice when designing for informal learning. Semi-structured interviews were conducted with seven interpretive planning professionals. The interview questions focused on the interpretive planning process and how it is enacted, the challenges that interpretive planners face, and how those challenges are navigated. The results showed a strong level of consistency and agreement across the participants' practices; while the interpretive planning process is flexible, interpretive planners share a systematic, visitor-centered approach that is grounded in the existing resources, capacities, and goals of the host organization and informed by theory in a range of fields. The results of this study paint a rich picture of the interpretive planning process and how interpretive planners navigate the various challenges that arise.

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Introduction

In the context of informal learning, “to interpret” is to communicate ideas in a manner that captures the audience’s attention and excites the mind. Interpretation is provocation, the “revelation of a larger truth” (Tilden & Bruce, 2004, p. 33). The interpretive mode of communication sets museums and other informal learning environments apart from formal learning experiences (Ham, 2013). How to create visitor experiences that embody the interpretive ideal, however, has been shrouded in a kind of mysticism: professionals in our sector refer to the “magic” or “art” of interpretation or interpretive planning (Beck & Cable, 2002; Brochu, 2014; Ham, 2013; Tilden & Bruce, 2007). Interpretive planning professionals say that interpretive planning looks different in every iteration (Brochu, 2003; Wells, Butler, & Koke, 2013); “it depends” is a common refrain throughout publications and professionals’ discourse. As interpretation and interpretive planning gains popularity in the museum field, a deeper understanding of interpretive planning is required.

Interpretive plans are living documents and decision-making aids used by museum professionals when developing persuasive and relatable visitor experiences. Interpretive plans can be utilized in a variety of scales, from plans for programs or exhibits to comprehensive or long-range interpretive master plans that encompass the entire institution. These plans help ensure that content is coherent, relevant, and enjoyable; they are typically grounded in research on communication and visitor studies and organized around a core message that the museum, exhibit, or program intends to communicate. Interpretive plans generally include recommendations on the museum’s or subject’s theme, subthemes, and organization; outcomes and indicators of success; interpretive media’s content, tone, and sometimes final text; aesthetics

and graphic elements; and education and evaluation recommendations. Interpretive planning is the process of generating interpretive plans.

The literature on interpretive planning repeatedly describes the process of generating an interpretive plan as highly idiosyncratic (Veverka, 2011; Brochu, 2013; Wells, Butler, & Koke, 2016). This is due to the fact that the interpretive planning process involves many factors—content development, restrictions due to place and space, budgetary considerations, institutional values, individuals’ personalities, and so on—that are unique to each project. The existing literature puts forth a significant body of guidelines, however, little research or literature exists that describes the gap between literature and practice and how practitioners navigate this gap.

This research is therefore centered on the process of generating an interpretive plan and how interpretive planners draw from diverse bodies of scholarship and their personal experience to inform their practice. It seeks to identify consistent patterns across highly successful interpretive planners’ processes and describe emergent consensus around “key practices and values,” a term that I use in contrast to best practices.

I resist the use of the term “best practices” for two reasons. First, the term “best practices” has been criticized as being exclusionary; museums’ capacities are heterogeneous and smaller institutions are often unable to achieve the “best practices” that are articulated in the context of larger institutions. Second, due in part to its idiosyncratic nature, interpretive planning is routinely described as “both an art and a science” (Morrissey, personal communication, December 14, 2016; Rand, personal communication, November 10, 2016). There is no one “right” way to do interpretive planning, but there are shared values and certain aspects of the interpretive planning process that experienced professionals in this field agree are essential to success. In my discussion of this study’s results and recommendations, I use the alternative term

“key practices and values” in light of these perspectives on the term “best practices” and the nature of the interpretive planning process.

The increased popularity of interpretive planning indicates that many practitioners are interested in using this powerful tool. The disconnect between theory and practice, however, is a significant barrier to those interested in incorporating interpretive planning into their exhibit development practice. The effect of this disconnect is felt most keenly by emerging professionals and organizations with a small staff and budget that are unable to retain the services of an experienced interpretive planning professional.

The purpose of this qualitative study is to describe how interpretive planners navigate the gap between the guidelines put forth in the literature and practice when designing for informal learning. My research seeks to answer the following questions:

1. How do interpretive planners describe the interpretive planning process?
2. What are the gaps between the guidelines and practice that interpretive planners encounter?
3. How do interpretive planners navigate those gaps?

Literature review

As previously noted, in the context of informal learning, “to interpret” is to communicate ideas in a manner that captures the audience’s attention and excites the mind. Interpretation is provocation, the “revelation of a larger truth” (Tilden & Bruce, 2004, p. 33). The interpretive mode of communication is what sets museums and other informal learning environments apart from formal learning experiences (Ham, 2013). How to create visitor experiences that embody the interpretive ideal, however, has been shrouded in a kind of mysticism; professionals in our sector refer to the “magic” or “art” of interpretation or interpretive planning (Beck & Cable, 2002; Brochu, 2014; Ham, 2013; Tilden & Bruce, 2007). Interpretive planning professionals say that interpretive planning looks different in every iteration (Brochu, 2003; Wells, Butler, & Koke, 2013); “it depends” is a common refrain throughout publications and professionals’ discourse. As interpretation and interpretive planning gains popularity in the museum field, a deeper understanding of interpretive planning is required. If interpretive planning is different in each iteration, what can we say about “best practices?” How do highly successful interpretive planners do what they do?

This chapter explores three areas of literature in an attempt to shed some light on these questions, and to provide context for the findings of this study. First, an overview of the literature on interpretation itself, including its guiding principles and values and its history in the informal learning world, provides context for the use of the term “interpretation” and the values that inform interpretive planning. The second section surveys literature on interpretive plans and planning and describes various models of interpretive planning from the past twenty years; this literature shows the consensus and divergences that occur across the various perspectives on interpretive planning. The final section is devoted to areas of scholarship and practices that

complement or parallel interpretive planning; this includes conceptual frameworks from informal learning theory and visitor studies and parallel practices such as content strategy and instructional systems design that corroborate the practices, challenges, and recommendations found in interpretive planning literature.

Interpretation

In the U.S., interpretation (as an explicitly articulated mode of communication with a unique set of guiding principles and values) originated in the Parks Service and natural resource interpretation (Cunningham, 2004; Ham, 2013; Ward & Wilkinson, 2006). As the museum field has become more visitor focused over recent decades, interpretation has gained traction as a useful approach to designing visitor experiences in a variety of settings (Brochu, 2003; Ham, 2013; Wells, Butler, & Koke, 2013). The adoption of the term interpretation or its practices, however, did not occur throughout the museum field in a concurrent, uniform fashion. Some professionals and organizations drew from existing expertise in natural resource interpretation to integrate interpretive principles into their design of visitor experiences, others developed visitor focused practices (McLean, 1993; Weaver, 2007) that, while apparently developed independently of interpretation, parallel the techniques of interpretation. Interpretation is an emerging area of practice the museum sector, with many differing ideas about what interpretation is and how it is enacted; the ongoing publication and success of interpretation training manuals, planning models, guides for success, and so on (Beck & Cable, 2002; Brochu, 2003; Cunningham, 2004; Ham, 2013; NAI, 2009; Serrell, 2015; Tilden, 2007; Veverka, 2011; Ward & Wilkinson, 2006) demonstrate the continued need for resources that can foster a shared understanding of interpretation in the museum sector.

Dictionaries define interpretation as “the act of explaining the meaning of something” (Interpretation, n.d.), but in the informal learning field, “to interpret” has come to mean more than this. In the words of Mary Kay Cunningham (2004), “over time, [interpretation] has moved from lecture-based *presentation* toward an interactive *exchange* of ideas between visitors and interpreters” (p. x). In his concise treatise on the nature and purpose of interpretation, *Interpreting our heritage*, Freeman Tilden (2007) defines interpretation as “an educational activity which aims to reveal meanings and relationships through the use of original objects, by firsthand experience, and by illustrative media, rather than simply to communicate factual information” (p. 33). Tilden provides this as a “dictionary definition” and states that “the true interpreter will not rest at any dictionary definition” (p.33). Originally published in 1957, his work has had a lasting impression on the interpretation field.

More recent publications often incorporate a mission-driven component to the definition of interpretation. For example, the National Association for Interpretation (NAI) defines interpretation as “a mission-based communication process that forges emotional and intellectual connections between the interests of the audience and the meanings inherent in the resource” (NAI, 2017). While there are numerous definitions of interpretation that place greater or lesser emphasis on various aspects of the term, they share a common vocabulary in describing interpretation. Nearly all definitions put forward in the past century include some variation of *content*, *object*, or *resource* and some variation of *people*, *visitor*, or *audience*. Other recurring terms in definitions of interpretation include *meaning*, *communication*, *connections*, *understanding*, *provocation*, and *discovery* (Beck, 2002; Cunningham, 2004; Ham, 2013; Ward & Wilkinson, 2006). These definitions share two key components: interpretation involves more

than mere relay of information, but rather the revelation of meaning; and there is a reciprocal relationship between the interpretive resource or materials and the audience.

The literature on interpretation describes both the *what* interpretation should be and do, and *how* to achieve those ideals. Various sources stress that interpretation should be meaningful, intentional, clear, and enjoyable (Beck, 2002; Cunningham, 2004; Ham, 2013; NAI, 2009; Tilden & Bruce, 2007; Ward & Wilkinson, 2006).

Interpretive experiences are made meaningful by revealing connections and showing how information is related to other things, such as a greater body of knowledge or the audience's personal experiences. Information alone is not interpretation (Tilden & Bruce, 2007). As Larry Beck and Ted Cable (2002) put it, information is the raw input and interpretation is the output. One of the ways that information is made meaningful is through universal concepts (Beck, 2002; Ham, 2013) such as life, death, growth, work, hunger, uncertainty, jealousy, love, good, evil, and happiness, to list just a few (Ham, 2013, p. 34). Universal concepts are aspects of the human experience which almost any person can relate to on a personal, lived-experience level, and they are very effective at fostering connections between resources and diverse audiences (Ham, 2013).

There are two stances in regards to how audience is handled, usually depending on whether the interpretation is personal (facilitated experiences or interpretive programs) or nonpersonal (exhibitry, labels, and other media). In personal interpretation, content is frequently targeted to meet the needs of specific audiences (Cunningham, 2004; Ward & Wilkinson, 2006). In nonpersonal interpretation, the common recommendation is to design content that will meet the needs of diverse audiences (Serrell, 2015). In nearly all cases, the literature recommends formative evaluation and prototyping to learn about the actual audiences' (or potential

audiences') existing knowledge and expectations of various interpretive content (Cunningham, 2004; Ham, 2013; NAI, 2009; Ward & Wilkinson, 2006).

Interpretive experiences are intentional when they have a defined purpose. A number of sources agree that at the most basic level, this means that interpretive experiences should be organized around a core theme or message to provide coherency throughout the experience (Ham, 2013; NAI, 2009). The theme should guide audiences towards the realization of the interpretive experience's goals (Beck & Cable, 2002; Cunningham, 2004; Ham, 2013; Ward & Wilkinson, 2006); goals align with the organization's mission, and generally they are broad and can be actualized in a number of ways. Multiple sources recommend that actual measurable outcomes for the audience should also be articulated and assessed in some way (Cunningham, 2004; Ward & Wilkinson, 2006).

Interpretive experiences are clear when content is apprehensible and can be readily understood by diverse audiences. In addition to being organized around a theme or core message, interpretive guides emphasize that interpretive experiences must present content in a logical sequence that builds understanding (Ham, 2013). This is achieved by first framing the "big picture" to provide context before becoming enmeshed in the details of the content (Beck & Cable, 2002; Cunningham, 2004; Tilden & Bruce, 2007). According to multiple sources, stories or narratives are often used to organize content because it is a way of organizing information that comes naturally to humans (Beck & Cable, 2002; Ward & Wilkinson, 2006). Furthermore, all aspects of the visitor experience should be coordinated to work towards the same end goal, thus enhancing clarity and coherency (NPS, 1998). In addition to clarity of content and language, the design of the interpretive experience should follow design principles that aid apprehendability

such as appropriate lighting, use of color and contrast, size and style of typeface, and so on (NAI, 2009; Serrell, 2015).

Many interpretive guidelines include content around enjoyment (Beck & Cable, 2002; Ham, 2013; NAI, 2009). Interpretive experiences should be enjoyable, not in the sense that they should always be amusing, but that they should foster positive cognitive and emotional states such as inspiration, satisfaction, or accomplishment. The visitor may be taxed, but should ultimately find the experience to be spiritually uplifting (NAI, 2009, p.9). One method of fostering enjoyable interpretive experiences is to think of the visitor holistically and engage the whole person (Beck & Cable, 2002). On a basic level this means designing experiences that meet the audiences' needs in terms of wayfinding, areas for rest, eating, and drinking, etc., as well as providing multisensory modes of engagement with the interpretive experience (Beck & Cable, 2002). "Engaging the whole person" also means to design content that speaks to multiple aspects of a person, not just one "phase" (Beck & Cable, 2002; Tilden, 2007). And finally, interpretive experiences should communicate the passion and enthusiasm of the interpreter (Beck & Cable, 2002; Cunningham, 2004; NAI, 2009; Tilden & Bruce, 2007; Ward & Wilkinson, 2006). This passion and enthusiasm sparks interest and promotes respect, care, and stewardship of resource (NAI, 2009), and moves interpretation away from dry instruction and towards an engaging conversation between the audience and the content.

Interpretive Plans and Planning

An interpretive approach can be applied in a wide range of applications, from label writing (Serrell, 2015) to institutional management (Putnam & Pacanowsky, 1983). The principles of interpretation remain constant but the practicalities vary depending on how

interpretation is applied. This study is exclusively concerned with interpretive planning for museums and other informal learning environments. For the purpose of this study, interpretive planning will include both exhibit and comprehensive planning; while the difference in scale does impact the interpretive planning process, the processes are closely related and there is a great deal of overlap in how interpretive planning is described at different scales in the literature (CSP, 2013; Veverka, 2011; Wells, Butler, & Koke, 2013).

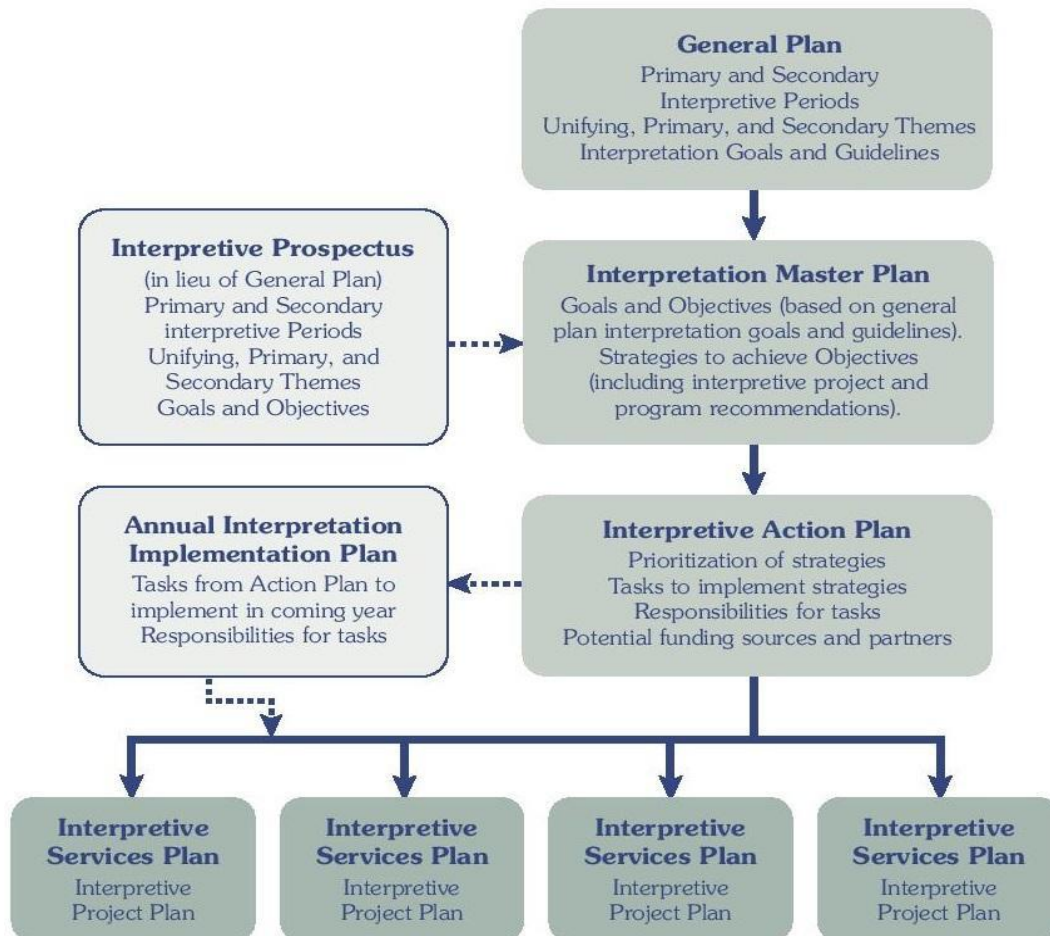
In the U.S., the national and state parks have the longest history with interpretation (Cunningham, 2004; Ward & Wilkinson, 2006) and some of the most robust literature on the interpretive planning process. The National Park Service (NPS) has published two workbooks, *Planning for Interpretation and Visitor Experience* (1998) and *Comprehensive Interpretive Planning* (2000). Both of these publications begin with an introduction to the principles of interpretation and the value of planning for interpretive experiences. They then go on to describe in detail the contents of an interpretive plan, but are less detailed in terms of the process of generating an interpretive plan. *Planning for Interpretation and Visitor Experience* (1998) describes the process as a team working together to ask and answer a series of questions (p. 2). Both of the publications from the NPS (1998, 2000) recommend annual implementation plans which provide concrete timelines for how the plans will be realized.

The planning resources from the NPS (1998, 2000) are organized around the contents of an interpretive plan and focus on information that will inform how a planning team answers questions about their own plan. For example, *Planning for Interpretation and Visitor Experience* (1998) provides pros and cons for different interpretive media choices to inform the “Recommendations” section of the interpretive plan. These resources provide a robust template of what interpretive plans at a variety of scales should include and detailed information about the

individual components, but leave the “how” of generating the plan in the hands of the planning team.

The California State Parks (CSP) published an *Interpretation Planning Workbook* (2013) that includes recommendations for planning in a range of scales, from General Plans and Interpretive Prospecti to more concrete Interpretive Master Plans and Action Plans. CSP (2013) states that, under their terminology, Interpretive Master Plans and Action Plans “more specifically define the objectives, methodologies and concepts for how the goals and guidelines identified in the General Plan will be achieved” (p. iv). This ultimately leads to Interpretive Service or Project Plans, which are applied at the program or exhibit scale. This complex hierarchy of plans is more easily understood with the aid of their graphic representation (p. v).

Figure 1: California State Parks hierarchy of interpretive plans.



Like the NPS resources, CSP (2013) begins with a chapter, “Success Starts Here,” that is devoted to framing the purpose and value of interpretive planning. Unlike NPS resources, this robust chapter (49 pages) also provides detailed information on the actual process of creating interpretive plans. It breaks the entire planning process into seven tasks with estimations of the time needed for completion: Assemble the team (one month), Research and documentation (one to three months), Stakeholder input - round one (one to two months), Assemble the planning foundation and recommendations (one to three months), Stakeholder input - round two (one month), Write the plan (one to four months), and Final plan approval and distribution (one to three months). The chapter goes on to describe the purpose of each task and provides recommendations on how to go about completing each task.

The subsequent chapters of CSP’s *Interpretation Planning Workbook* (2013) each devoted to one of the types of plans outlined in the hierarchy above. CSP provides a detailed template for each type of plan, including chapters and subsections, and the *Workbook* (CSP, 2013) goes on to describe the contents of each section of the plan and an outline for the process of generating the plan that is similar to the one described in the previous paragraph. While this level of detail may seem comforting to the neophyte interpretive planner, it does run the risk of formulaic planning and creating a "doorstop," lacking in the creativity and passion of interpretation.

In *Interpretive Master Planning*, Veverka (2011) begins by framing interpretive communication and the purpose of interpretive planning, and then goes on to describe a model of the planning process that can be used “for major planning projects or one interpretive trail sign”

(p. 55). This model, derived from the Peart/Woods (1976) interpretive planning model, is essentially a list of questions which the planning team needs to answer about their project (p.55):

What: The resource, theme, and subtheme to be interpreted.

Why: The specific objectives that interpretation should accomplish.

Who: The visitors to our site, how we can relate our theme to them.

How/When/Where: The presentation of our interpretive programs and services.

Implementation and Operations: What it will cost (time, resources, budget, people) to implement various aspects of the plan.

So what: How we will evaluate the parts of the plan to see if all objectives are being achieved.

Veverka (2011) goes on to provide a general plan outline that suggests content and organization of an interpretive plan, and describe how the process of enacting this model generally unfolds. In describing the planning process, Veverka stresses the importance of the first three “questions.” These questions are asked and answered concurrently as the information gathered in each area impacts the answers to the other questions. Once these first questions are thoughtfully addressed, the planning process moves through recommendations for interpretive media, the *How/When/Where* section, and concludes with the logistics of implementation and assessment.

In *Interpretive Planning for Museums: Integrating Visitor Perspectives in Decision Making*, Marcella Wells, Barbara Butler, and Judith Koke (2013) address both Master Interpretive Planning and Project Interpretive Planning. Master Interpretive Planning and Project Interpretive Planning are each described as arising from a particular situation that generates a need for a plan, which then leads to articulating the purpose and goals of the interpretive plan.

The situation and need relate to the organization's identity, mission, and the role of interpretation (p. 73). The purpose and goals of the plans are general statements that tie the interpretive plans back to the organization's mission (p. 75). Once the goal or purpose of the plan has been articulated, the process of creating the plans share the same steps: inventory, analysis, themes and visitor experience, recommendations, and implementation guidelines. Master and Project Interpretive Plans follow the same process with only slight differences in the kind of information being collected and analyzed.

The planning process begins with an inventory stage which involves gathering information on *supply* and *demand* (p. 80, 109). The *supply* aspect of inventory includes institutional resources such as space, budget, and staff; interpretive resources such as objects, collections, or stories; and existing data from visitor studies or market research (p. 80, 109). The *demand* aspect of inventory relates to understanding the audience and market environment; relevant data include who visits the museum and why, what barriers exist to visitor engagement or potential audiences, understanding the perspectives and expectations of the museum's community and stakeholders, and formative and remedial evaluation of potential interpretive experiences (p. 82, 110).

The information generated in the inventory step is then analyzed and these two steps are described as "perhaps the most important part of any interpretive planning process" (p. 83). Analysis provides the rationale to support decisions about how to move forward with the plan (p. 83, 113); it provides a link between the museum's situation and mission to the interpretive experience and records in written form the logic behind decisions (p. 85, 113).

The information generated in the inventory and analysis steps then inform decisions about the theme and visitor experience (p. 115). While other planners begin the planning process

with themes (p.114)—also known as the main message or big idea (p. 90)—Wells, Butler, and Koke’s (2013) model recommends developing themes only after the initial inventory and analysis (p. 115). Wells, Butler, and Koke describe themes as “complete and compelling statements about topics or ideas” (p. 115) that the interpretive experience is designed to communicate to the visitor. Visitor experience relates to the kind of experience that the museum wishes to foster, and might be described as a “vision for visitor experience” or “philosophy about visitors” (p. 92) and might include language like a sense of “wonder,” “inquiry,” or “service” (p.117).

After developing the theme and the vision of the visitor experience, interpretive planners can begin to consider recommendations about the key initiatives in Master Interpretive Plans (p. 95) or the design and content of interpretive media in Project Interpretive Plans (p. 118). Planners consider and assess various options and choose the methods of message delivery that align most closely with the previous aspects of the planning process (p. 95). If possible, audience input can be integrated into the selection process (p. 119).

And finally, Wells, Butler, and Koke recommend that the plans conclude with implementation guidelines that address the logistics of staffing, funding, resources, timelines and sequencing, and assessment or indicators of success (p. 99, 124). Overall, a Master Interpretive Plan should “describe the museum’s desired relationship with its community” (p. 101) and a Project Interpretive Plan should serve as an “administrative record of project discussions and decisions” and also “describe the vision and direction for the project’s intended impact” (p. 127).

In *Interpretive Planning: The 5-M Model for Successful Planning Projects*, Brochu (2014) begins with a brief introduction to interpretation and planning and then goes on to describe her process and model. She states that there is “no single method or set of steps that will

guarantee success in any situation,” but describes the planning process as generally progressing from gathering *information* to *analysis* of the information, which leads to identifying *options*, and ultimately ends in *action* (p. 55). By overlaying the 5-Ms of the model on this four-step process, the interpretive planning team “ensures that none of the critical components will be ignored” (p.67). Brochu describes these critical components, the 5-Ms, as follows:

Management: The component in which the influences of the agency or organization and their impact on the plan are documented; some of the aspects of Management include policies, operational resources, and mission (p.71).

Markets: The audience or market that the interpretive plan proposes to serve; a market analysis can “range from a simple identification of the intended audience to a detailed examination of existing and proposed market segments and the complexities of the market climate” (p. 87).

Message: Messages connect visitors to resources and are at the core of interpretation; interpretive messages can be based on three things: what are the most significant stories about the interpretive resource, what are visitors interested in, and what does management need to communicate (p.101).

Mechanics: The physical practicalities of the interpretive experience, both large and small scale; these include balanced design, holistic visitor experience considerations, site considerations, and project development and fabrication timelines (p. 117).

Media: The means through which the message is communicated to the visitor, such as personal interpretation programs, exhibit labels, or audio guides (p. 135). The previous four Ms form a kind of foundation on which Media is overlaid; media choices should be based on sound information and analysis of the previous four Ms (p. 69).

In the process of planning, Brochu (2014) stresses the importance of the analysis step which she states is the “most frequently overlooked aspect of planning, and yet, it is undoubtedly one of the most important” (p. 58). Analysis, she goes on to say, is more than the mere information in each of the five Ms that answers the questions of *who*, *what*, *where*, and *why*, but the information’s implications and the actions it suggests (p.58).

In describing the planning process, Brochu states that the process must always be flexible as each project arises from unique circumstances and will encounter its own challenges (p. 62) and describes some of the common pitfalls of planning, such as “jumping to media selection” and “ignoring the facts” (p. 63). She states that:

For years, interpretive planning proponents have tried to distill the process into more detailed steps so that anyone could write an interpretive plan if he or she simply followed the directions and filled in the blanks. Some planners suggest that filling out forms or holding X number of meetings will leave you with a plan. While this approach may provide a comfort zone for inexperienced planners and often results in a document that can be called a plan, it does little to create viable solutions to significant planning challenges (p.68).

One of the least structured models in the literature in terms of the plan content and format, Brochu’s model and process is intended to provide a guide to the important considerations of planning and suggestions on how to analyze the information that goes into the planning process. It is not intended to function as a “cookbook” with which anyone can create a plan by filling in the blanks (p. 68).

The models of the planning process outlined above differ in their language, the steps or aspects they emphasize, and the level of detail in terms of the interpretive plans content, format,

and individual tasks that comprise the planning process. All of the models involve documentation of the plan and planning process; a clear, concise statement that encapsulates the interpretive theme or message; research and analysis of information relating to organizational and interpretive resources, messages, and audiences to inform the decision-making process; recommendations on design and media only after the initial research and analysis; and a plan for the logistics of implementation and assessment of the plan.

All of the models share similarities with the best practices of interpretive planning articulated by NAI (2009). The thirteen “benchmarks” in *Standards and Practices for Interpretive Planning* have each been divided into three levels of achievement labelled *good*, *better*, and *best* (p. 3), and can be categorized as relating to organizational resources and mission, market and audience analysis, stakeholder involvement, and messaging and media choices. The benchmarks’ achievements echo various models’ recommendations, such as the benchmark that media recommendations should align with the goals of the interpretive plan (p. 10) and that the visitor experience is planned holistically (p. 17).

Related Practices

In addition to drawing from scholarship in interpretation, many of the models described here draw from conceptual frameworks from learning theory and visitor studies. The learning landscape was described in *Interpretive Planning for Museums* as a way for conceptualizing visitors and their experience in museums; it emphasizes that learning occurs throughout the learner’s lifetime and in a variety of both formal and informal contexts, and that learning occurs in response to the learners’ shifting needs and interests. The learning landscape is presented in

order to show that there are “opportunities for museums to make a significant contribution to learning” (Wells, Butler & Koke, 2013, p. 18).

Wells, Butler & Koke (2013) cite various researchers in learning and education in association with the learning landscape, including the National Research Council’s *Learning Science in Informal Environments: People, Places, and Pursuits*, which draws from Banks et al.’s (2007) life-long, life-wide, and life-deep construct of learning. *Learning In and Out of School in Diverse Environments: Life-Long, Life-Wide, Life Deep* synthesized empirical research on learning in formal and informal environments and resulted in “a conceptual framework for life-long, life-wide, and life-deep learning that highlights developmental, spatial/contextual, and value-laden dimensions of the process and outcomes of learning, respectively” (Bell, n.d.).

Multiple interpretive planners (Brochu, 2014; Ham, 2013; Wells, Butler & Koke, 2013) refer to Falk’s visitor identities framework. This framework is based on empirical data gathered on visitors’ motivations and behaviors in museums, and builds on the work of prior theorists (such as Packer and Ballentyne, 2002) that investigated museum visitor motivations (King, n.d.). Falk’s visitor identities framework provides a roadmap to common visitor types and their motivations for visiting museums; visitors can have multiple identities and they are fluid depending on context. Professionals in the field of evaluation (visitor studies enacted within a museum for institutional use) also draw from Falk’s visitor identities (Diamond, Luke & Uttal, 2009). Interpretive planning, visitor studies, and evaluation all draw from similar theoretical foundations because they are all concerned with how and why visitors use museums; this information helps interpretive planners to design experiences that are relevant and effective.

The confluence of developments in the fields of learning theory and visitor studies in the latter part of the twentieth century lead to a rise in visitor-centered philosophies in the museum

sector as shown by the rising frequency of visitor-centered publications (such as, McLean, 1993; Weil, 1999). Interpretation is centered on meaning-making and connections (Beck & Cable, 2002; Tilden & Bruce, 2007); this is congruent with both scholarship in the field of learning theory, and how the museum field understands the nature of informal learning. Constructivist, social, and cultural learning theories all describe the learning process as highly contextual and that learner makes information meaningful through the connections (Bandura, 1971; Lave & Wenger, 2002; Piaget, 1952; Rogoff, 1995; Vygotsky, 1978; Wenger, 1998). With the rise of visitor-centered approaches, interpretation, as a well-reasoned approach to communication that is supported by both success of its practice and empirical and theoretical research in related fields, has gained traction and visibility in the museum sector.

Interpretive planning shares similarities to other practices in the fields of communication and education. For example, in the field of communication, content strategy is the process of planning for “the creation, publication, and governance of useful, usable content” (Halvorson, 2008); the term “content strategy” is usually used in the context of web content. Content strategy as a discipline recognizes that communication is more than clarity and ease of use in design, but also of the content itself; Kristina Halvorson exhorts content strategists to ask “the scary, important questions about content, such as ‘What’s the point?’ or ‘Who cares?’” and that content strategists “must work to define not only which content will be published, but why we’re publishing it in the first place” (Halvorson, 2008). These meaty questions about content will resonate with interpretive planners, a group of professionals that are also deeply concerned with the user and the purpose of the content that they develop.

While content strategy has a unique set of challenges that are not applicable in interpretive planning (search engine optimization, for example), content strategy and interpretive

planning are similar in that they both are processes for developing meaningful and user-friendly content. In *Content Strategy for the Web*, Halvorson describes the process of applying content strategy to web design; this process involves the *alignment* of personnel from diverse areas of the organization with this approach to content, *audit* of existing content, *analysis* of the content and its context in the greater world, identification of a *core strategy* that is flexible and motivational, and finally results in the development in the structure, substance, flow, and management of the content itself. These steps can easily be mapped onto interpretive planning models' processes, which also involve gathering information, analyzing the data, identifying unifying goals, and ends with recommendations on interpretive experiences' design, content, implementation, and assessment.

The emergence of content strategy also shares similarities with interpretive planning's emergence. For example, prior to the rise in interpretive planning's popularity, it was common to leave the development of content in the hands of the experts, such as curators and other content specialists. Halvorson states that web designers are similarly wont to leave content in hands of the client, feeling that "the people who make websites shouldn't have to worry about [content] in the first place" (2008). She goes on to say that "it's time to make content matter" and that web designers have a responsibility to concern themselves with content (Halvorson, 2008). Similarly, professionals in the field of museum exhibit development began to concern themselves more deeply with content in the latter part of the twentieth century and the rise of visitor-centric outlooks in museums.

In the field of education, instructional design is the "systematic process by which instructional materials are designed, developed, and delivered" (Instructional design definitions, n.d.); it draws from scholarship in learning and instruction to ensure quality of instruction

(Instructional design definitions, n.d.). Interpretive planning relates to informal, or non-instruction-based learning, but interpretive planning and instructional design share similar foundations in scholarship on cognition and learning, and similar goals of effectively communicating with the user.

There are a number of models within instructional design. In her lively book, *Design for how people learn*, Dirksen does not focus on process as much as various aspects that must be considered in the designing process, and special considerations or strategies when designing for specific kinds of outcomes such as skills, habits, or motivation. Dirksen emphasizes the importance of understanding the learners and their current skills, and the purpose of the learning experience; she states that it is essential to identify the “gap” between where learners are now and where you want them to be by the end of the learning experience in order to design effective instructional materials (Dirksen, 2008, p. 73). This emphasis on understanding the learners and the goals of the project is similar to the principles of interpretive planning’s emphasis on audience, institutional goals, and interpretive themes.

ISD from the ground up: A no-nonsense approach to instructional design (Hodell, 2011) focuses on the ADDIE model of instructional design. ADDIE stands for *analysis* of the need for and goals of the instructional design, *design* of the instructional experience (this is the central function of the process through which every other step is processed), *development* of the instructional materials, *implementation* of the instructional experience, and *evaluation* of the efficacy of the instructional experience. These steps are similar to interpretive planning, though interpretive planning does place greater emphasis on the initial analysis, design, and development phases. The ADDIE model relates design to implementation and evaluation and then includes the realization of the design; interpretive planning also relates design to

implementation and evaluation makes recommendations regarding those aspects of the plan, but interpretive planners are not typically associated with the realization of those recommendations.

The challenges associated with utilizing the ADDIE model are similar to those described in interpretive planning. Chuck Hodell states that “analysis is the foundation for any instructional design project” but that it is also the most often neglected aspect of instruction design (p. 33); Brochu (2014) makes a similar statement about the (often overlooked) importance of analysis in *The 5-M model of interpretive planning* (p. 58).

Interpretive planning shares similar processes, challenges, and strategies for success with practices in other fields. Its emergence as a professional discipline also follows similar patterns and timelines of related practices; this reflects the changes in our understanding of communication and education that have occurred over the past century. These related practices are recognized as professional disciplines within their field. Interpretive planning’s similarities to these related practices support its status as a distinct professional practice with its own set of guiding principles, values, and conventions regarding practice and process.

Summary

This review focused on the history of interpretation, recent models of interpretive planning, and related areas of scholarship and practice. In recent decades, interpretation has gained traction in the museum sector as a useful approach to visitor-centered activities; the principles of interpretive communication align with other areas of scholarship, such as informal learning theory and visitor studies, and helps to ensure that visitor experiences are meaningful and enjoyable. While there are a number of distinct models of interpretive planning, they share similarities in their systematic approach and the emphasis that is placed on the initial stages of

the planning process: the gathering and analysis of information from diverse sources.

Additionally, there are “best practices” of interpretative planning that reflect the recommendations found in various models; the best practices, however, only say *what* to do and do not provide guidance on *how*.

The literature leaves several questions unanswered on the nature of interpretive planning, the challenges that interpretive planners encounter, and the strategies they utilize to combat these challenges. This study conducted interviews with highly successful interpretive planners in order to contribute to filling the gaps in the existing literature. The following chapter describes the methods and participants of this study.

Methods

The purpose of this research was to describe how interpretive planners navigate the gap between the guidelines put forth in the literature and practice when designing for informal learning. This research was guided by the following questions:

1. How do interpretive planners describe the interpretive planning process?
2. What are the gaps between the guidelines and practice that interpretive planners encounter?
3. How do interpretive planners navigate those gaps?

This research employed a qualitative approach and used semi-structured interviews to gain an in-depth understanding of participants' perspectives. This research was interpretive and appreciative in nature; it sought to richly describe the best instances of interpretive planning as examples that can be presented to the field, thus giving museum professionals insights on how successful interpretive planners do what they do. By directly examining interpretive planners and their process, this research intended to provide a more complete picture of the interpretive planning process than currently exists in the literature. Qualitative research has been described as "an approach for exploring and understanding the meaning individuals or groups ascribe to a social or human problem" (Creswell, 2014, p. 4). The qualitative approach was therefore particularly relevant to this research because the research questions pertained to the lived experience of enacting the interpretive planning process; the research relied on subjective data that could only be gained through conversation with experienced interpretive planning professionals.

Seven individual research participants were included in this study. Individuals were purposively selected based on the following criteria. All participants met all selection criteria.

1. Demonstrated experience in interpretive planning;
2. Recognized in the field as experts in interpretive planning, e.g., awards relating to their work in interpretation, writing on interpretation published in peer reviewed journals; and
3. Demonstrated reflexivity on their practice, e.g., blog posts on their experience as a practitioner, presentation at professional network events on their experience as a practitioner.

Table 1: Participants. Participants are listed with their professional affiliation at the time they were initially contacted and one example of a project that meets a selection criterion.

PARTICIPANT	PROFESSIONAL AFFILIATION	SELECTED PROJECT
Carol Bossert	CB Services, LLC	Interpretive planning, NASA Glenn Visitor Center (Cleveland, OH)
Lisa Brochu	Heartfelt Associates	Developer, NAI Certified Interpreter Planner certification program
Sam Ham	University of Idaho	Author, <i>Interpretation: Making a difference on purpose</i>
Linda Norris	Independent Consultant	Interpretive planning, Harriet Beecher Stowe House (Cincinnati, OH)
Judy Rand	Rand & Associates, LLC	Interpretive master planning, Desert Botanical Garden (Phoenix, AZ)
John Veverka	JV & Associates	Associate Editor, <i>The Journal of Interpretation</i>
Marcella Wells	Wells Resources, Inc.	Author, <i>Interpretive planning for museums</i>

I conducted literature and internet research to identify potential participants that met the selection criteria. Individuals were contacted via email, introduced to the research topic, and invited to participate. All protocol was approved by university IRB.

The interview questions were semi-structured and included numerous probes in order to allow the researcher to pursue emergent avenues of inquiry that arose during the interviews. For example, one of the questions asked in multiple interviews was “Do you think that there are best practices of interpretive planning?” If the participant answered in the affirmative, an associated probe was “Do you think that those best practices can be taught?” For the full instrument, see Appendix A (p. 56). Interviews were conducted remotely using Zoom software which recorded audio of all interviews. Interviews occurred over seven days between February 5, 2017 and February 11, 2017.

All interview recordings and documents were uploaded to a research project file using NVivo. In qualitative research, data analysis “proceeds hand-in-hand” with data collection and writing for dissemination (Creswell, 2014, p. 195). For this reason, interview data were coded using emergent coding; in this instance, emergent coding was more appropriate than *a priori* coding based on existing interpretive planning frameworks because the purpose of this study was not to confirm or deny the utility of any framework, but rather to describe the interpretive planning process as it is enacted. For a complete coding chart with examples, see Appendix B (p. 57).

Results

The results of this study paint a rich picture of the interpretive planning process and how interpretive planners navigate the various challenges that arise. The findings are broken into four main areas:

How planners describe interpretive plans explores the nature of how interpretive plans are used, the value of interpretive plans, the history of interpretive planning in the museum field and the level of field-wide understanding of interpretation and interpretive planning.

The interpretive planning process describes the tasks and their sequence in the interpretive planning process; this section addresses the oft-repeated response to queries about the interpretive planning process, “it depends,” and highlights commonalities across interpretive planners’ practices.

Gaps between theory and practice addresses the challenges that arise throughout the interpretive planning process, from first steps through implementation.

Strategies for success shows how interpretive planners navigate those challenges and keep their interpretive planning project on the right course.

How planners describe interpretive plans

When describing how interpretive plans are used, one participant said that “ultimately boils down to effectively accomplishing objectives. Plans are tools for ensuring you are meeting objectives.” In a similar vein, another participant described plans as accountability devices that provide “insurance” by showing how design decisions align with the project’s goals and “guidance” for implementation; this participant also noted that interpretive plans do not restrict

flexibility in the design process because plans should be used adaptively as circumstances change. Another participant stated that interpretive planning allows organizations to make brave choices and try new things—you may fail, but you “fail fast” by testing your ideas.

Interpretive plans clarify the purpose of projects by “backing up” and asking, “why are we even doing an exhibit on [this particular topic]?” They also function as a management tool that helps groups to find ways forward together. One participant stated that when clients say they need an interpretive plan, “what they really mean is we need to figure out a way to make decisions together.” Another participant stated, “it’s an institutional memory, it’s a process of thinking and deliberation that helps bring people together. It gets discrepant views on the table and then you can reconcile and negotiate.”

One participant identified that interpretive plans unique contribution to exhibit development is that they ensure museums engage with their visitors and do more than simply impart a message. This participant went on to say that “[interpreting planning] is much more about how to engage with people ... you still have goals, but it’s a different process [than strictly goal-driven processes].” As another participant put it, interpretive planning results in exhibits that are “more accessible, family friendly, visitor friendly, and interesting.”

Three participants spoke about the history of interpretation in the U.S.’s national and state parks versus museums and how interpretation’s history has impacted its acceptance and utilization in the museum sector. They noted that the term “interpretive planning” originated in the National Park Service, that the term “was never in question,” and “interpretation was always important to them—it was never in question.” In contrast, two participants noted that museums have a much longer history in developing experiences for the public, but that “they never really acknowledged interpretation” until the latter part of the twentieth century. Instead, museums

described their activities as “education,” “learning,” “communicating,” “programming” or “exhibits.” As the museum field became more visitor focused and came to view learning as a process of meaning-making, interpretation began to gain popularity.

The museum field, however, did not integrate interpretation in a systematic or consistent manner, and this has resulted in a lack of generalized, field-wide understanding. The majority of participants noted this lack of clarity in the museum sector’s understanding of interpretation and interpretive planning. One participant noted that “when you talk to other people about interpretive planning, sometimes people don’t know what that means.” Another participant stated that “[interpretive planning] is so fuzzy! It's not just people not in the field who don't know, like when you're trying to explain what you do to people, but I think even in the field it’s a little fuzzy.” Another participant noted that because interpretive planning “happens up front” and so much of the work is “talking, thinking, ... and writing,” the process of interpretive planning is “invisible to most museum professionals.”

The interpretive planning process

The interpretive planners that participated in this study emphasized that while the planning process varies from project to project, the process remains systematic. They gather information in three key areas (institutional resources and goals, interpretive resources and themes, and visitor and community studies), analyze the information they have compiled, and make recommendations for the interpretive experience that align with what they learned from the initial inventory and analysis of information.

When describing the interpretive planning process, the majority of participants said “it depends.” One participant stated that “every project is unique, so it requires a different process,

you need to adapt to different situations,” and another said that “it depends on the client and really what it is they want to do. And more importantly, what their final goal is.” All of the participants, however, were able to describe a process that they work through in each planning project. In all cases, the process begins with gathering and analyzing information. Some described the process as involving iterative analysis of the information gathered in this initial inventory stage of the planning process; “circling back” to this information is necessary in order to check that decisions made throughout the planning process can be justified and the recommendations align with the project’s original intent. Participants started with different areas—for example, some participants started with identifying interpretive themes while others started with examining institutional goals—but all planners considered information in each of these areas prior to making any recommendations on media, content, or design of the interpretive experience.

- ❖ **Institutional resources and goals:** The institution’s capacity across multiple dimensions, including physical space and structure, financial resources, and staff expertise and capacity; the institution’s mission, vision, and strategic goals.
- ❖ **Interpretive resources and themes:** The cultural or natural resources, objects, or concepts that are the subject of interpretation and the themes or stories that those resources are best positioned to communicate.
- ❖ **Visitor and community studies:** The actual and potential audiences of the interpretive experience, especially their interests, motivations, and needs in relationship to the interpretive resources and themes.

While it is true that the planning process is influenced by many factors and no two plans are alike, the participants in this study described their processes in much the same way. As one

participant said, “I don’t like to do formulaic planning, but I do like to do systematic planning. What that means is I go through the same steps or similar, but every single plan is different.” The majority of participants describe interpretive planning as being a methodical or systematic process in that the individual components of the plan or the planning process may vary, but the decisions are driven by interpretive communication principles and supported by data gathered in the initial inventory stages of the planning process. A number of participants described the planning process as answering a series of questions; the questions remain the same, but the answers and the ways in which the planning team goes about finding the answers varies depending on the individual planning project.

This process aligns with multiple planning frameworks, such as the ADDIE Instructional Design System and *The 5-M Model for Interpretive Planning*. In the ADDIE model of instructional design, the process begins with *analysis*, followed by *design* and *development*, and ends with *implementation* and *evaluation* (Hodell, 2011). *The 5-M Model* gives five domains of information that must be considered and describes the planning process as generally progressing from gathering *information* to *analysis* of the information, which leads to identifying *options*, and ultimately ends in *action* (Brochu, 2014, p. 55). The unique aspect of interpretive planning as opposed to other forms of planning or design is the emphasis that is placed on the initial information gathering, which draws from diverse internal and external factors. Interpretive plans not only need to design interesting and meaningful visitor experiences—they must be practical and actionable plans for the host organization.

Gaps between theory and practice

The topic of challenges in the interpretive planning process generated the most divergent area of results. After identifying emergent themes in the data and creating codes for similar challenges, each interview identified at least one challenge that was coded as “other.” The challenges that participants identified relate to both the planning process and the plan’s content, and the main categories of challenges that participants discussed are divergent goals of the for the project, different understandings of interpretive communication, design recommendations that are lacking in visitor engagement or relevance, design recommendations being made too early in the planning process, and various challenges around implementation logistics.

Divergent goals for the interpretive experience was mentioned most often as a significant challenge. One participant stated that “one of the biggest challenges is that people don’t listen to each other. And very often you’ll get somebody on a planning team who has an agenda, and they try to drive the project to meet that agenda rather than do what’s in the best interest of the agency, organization, mission, resource, and the rest of the team. ... I have found myself in the position ... of having to play peace maker, and get people on the same page. Group dynamics seems to be a big challenge in planning.” This participant went on to say that “in most cases, I think it’s a *difference of opinion about what they’re actually trying to achieve* [emphasis added].”

One participant noted that because the purpose of the planning project is for internal use and “doesn’t end up on the wall or anything,” that the stakeholders undervalue the importance of cogency of purpose and goals; sometimes they are resistant to doing the hard work of teasing out the various perspectives on the purpose and goals of the project, and coming to a “mutual

understanding” of the project’s purpose and goals “that necessarily is simple, clear, cogent enough for them to all understand in the same way.”

Participants also noted that different levels of stakeholders’ understanding of interpretive communication (as opposed to education and instruction) impacted how they related to the project’s purpose and goals. One participant stated that “somebody at one point said to us ‘this is not why I studied history, this is not what history is, this dialog-based interpretation’ and ... some people didn’t think that letting visitors have opinions or engage in dialog was an appropriate way to share history.” Another participant said that “people think that interpretation is only the process of communicating the resource ... to others, so the vision is always from the inside out” and when the planning team becomes enmeshed in this approach to communication, “we’re not thinking about what we want our audiences to do ... or what do people need to be equipped with, to either understand our exhibition ... or be equipped to go out into the world.

Participants noted that visitor engagement or relevance for visitors was a challenge that routinely occurs in the interpretive planning process, and that this often arises from narrow outcomes or objectives for the project as opposed to more holistic overarching goals. One participant said that “we confuse goals with outcomes. A goal is something ... we want to move to, but there might be a variety of ways to finally getting there.” This participant went on to say that “exhibitions need to be more like conversations than lectures. And, unfortunately, what we do when we create our goals, we almost box ourselves in. ... If we have a goal of audience participation, it’s very structured.”

Participants also said that various stakeholders often begin to make design recommendations too early in the planning process. One participant said people start thinking about design choices and “get locked into a media-type before ever thinking through any of these

other considerations.” Another participant said that “people ... love to jump immediately to the experience – ‘what are we gonna do? Look! We could have a butterfly slide!’ – ... and instead of jumping right to that, [you need] to really go back and forth and look at what the purpose, the audience, and the subject all together ... suggest to you.” As another participant said, “if media are brought in too soon, it’s infotainment. A personal experience with line, form, texture, balance, time and space, all those things artists manipulate, and the message becomes a secondary thing.” Two participants explained that when people make design recommendations without rationale, they are missing the analysis stage of the interpretive planning process. One participant said that people “make recommendations on what kind of exhibit or output they’re going to put together, and they forgot the gap of the analysis.” This participant goes on to say that “if you can’t trace that idea through the plan to the recommendations with logic and rationale, and I think that that ends up being one of those huge gaps between theory and practice.”

Participants also said that challenges commonly arise around the logistics of implementing the interpretive plan. Sometimes the implementation challenges are due to the plan itself, or due to the host organization not taking action after the planning process ends. One participant said that considering implementation and maintenance “very often gets left out by inexperienced planners” and another participant said that “sometimes to be frank, the interpretive master plan was underbudgeted, so the work that the organization got was less than what they needed. Because the planner and designer work could only do so much.”

Other participants noted that sometimes the plan does not align with the host organization’s goals or capacity, and this leads to issues with implementation. One participant said “I wrote so many interpretive plans, or interpretive master plans, especially, that I just hear tales that so

much work went into the plan and then the plan wasn't put in effect. Sometimes it's because there was one person at the organization that was the champion, she or he made sure we were going to do this thing, and then she or he left." Another participant said interpretive planners need to "make sure that the things that we plan are things that the client actually does want to eventually develop or install." Two participants noted the importance of operational capacity and its relationship to implementation. One participant said "if a plan doesn't consider those operational resources then it's likely that it will end up on the shelf and not be used, because it can't be implemented."

Other challenges that participants spoke about include the planning team becoming bogged down in irrelevant data and experiencing "analysis paralysis," a lack of continuity from a master or comprehensive plan to program or exhibit designs, insular departments within museums that stymie the flow of information within an organization, and interpretive planning being performed in a codified manner that stifles the creativity of team members.

Strategies for success

"All things are 100% audience dependent."

While discussion around challenges produced the widest range of ideas, discussion around strategies for success showed the greatest consistency across participants' responses. The key areas that participants focused on were *visitor thinking* and *team building* within the interpretive plan's stakeholders.

Strategies coded as "visitor thinking" were centered around the interpretive approach to communication—the idea that "information alone is not interpretation" (Tilden & Bruce, 2007). Interpretive planners emphasize that interpretation involves revelation and meaning-making, and

that using instruction techniques to impart a message in a didactic fashion is not interpretation. Participants said that the ultimate goal of interpretation is visitors “becoming their own selves.” One participant said “we know the main thing interpretation should do regardless of its form or content ... is make people think their own thoughts—it’s called elaboration in psychology, or systematic processing.”

Interpretive planners integrate visitor thinking into the planning process by considering the experience they are designing from the visitor’s perspective—what will visitors see, feel, think, and do—and how the design of the interpretive experience can support the visitors’ needs. One participant said that “we have to double back and look at it not just from our point of view but the visitors point of view. So, it’s not just why do we want to create this interpretive exhibit or experience, it’s why would visitors care? ... What is it that they would find relevant, interesting, and useful?” Another participant said interpretive planners ask themselves “what does the audience need to be equipped to engage with the resource, but also to engage with each other, to engage with their world beyond the walls of the museum,” and that this approach “acknowledges that visitors are coming in not as blank slates, and they’re not leaving as blank slates.”

Visitor thinking helped participants match audiences with messages and design content in a manner that the visitors will be able to relate to. One participant said that “the audience influences message as much as messages influence the audience, and the same with objectives.” This participant went on to say that the connections between audience, message, and objectives was important to planning process, and that planners need to “keep those always in the front of your mind, because as you go through the process—and especially when you get down to the media and people start generating ideas and ideas take on a life of their own, and you get the

people who go ‘Oh this would be fun, this would be cool, let’s do this!’—and then you take them back and say, ‘is that going to be serving any of these objectives, is it the right way to tell our message to our audiences,’ and you have to go back and do a check and balance.’”

“Testing things out” through prototyping, focus groups, or simply talking to visitors was one of the tools that participants rely on as they engage in visitor thinking. When talking about the importance of testing design ideas with potential audiences, one participant said it “comes down to actually talking to them.” This participant also said that “you can’t move forward on ... ideas without knowing if they work or not.” Another participant said “I’m a big believer in bringing in focus groups, audience potential users to get their reaction ... I do more of a market-based approach to planning rather than a resource-based approach, so that what is being planned and implemented is actually what’s needed and desired by the public as well as the agency or organization that’s putting it out there.”

In addition to visitor thinking, participants emphasized the importance of team building strategies to the interpretive planning process. Strategies coded as “team building” focused on building shared understandings of the project and interpretive communication, collaborative decision making, and creative problem solving. Building shared understandings often started with building a shared vocabulary that all stakeholders understood in the same way. One participant said “I [try] to listen very carefully to ... the vocabulary that everyone else uses and try to fit in to that, because I feel that that’s one of the strengths that I can bring to a job.” Three participants spoke about the importance of starting each project by clarifying the vocabulary and what is meant by terms like “interpretation” and “interpretive planning.”

Participants also talked about having a clear vision of what success looks like and making sure all the team members are working towards to same goals. As one participant said everyone

needs to be at the table and “on day one, we all need to talk about the end game and what success looks like, talk about the audience, and talk about themes. And once they’re calibrated with that point of view, they can really get into it. So, we need to make time to nurture that.” Another participant uses interpretation and interpretive planning literature to “explain to museums and groups at the very beginning of the process: what is interpretation anyway, what can it and can’t it do, what is interpretive planning, and what are the benchmarks. And ... using these really clear, really great benchmarks, I see the light going off over their heads.”

The majority of participants talked about the importance of the interpretive planner being a skilled facilitator and integrating multiple perspectives throughout the planning process. One participant said “I listen to them, I take what they said, I temper it with good planning sense and experience, and then we talk about how to make it all work to help everybody, so that everybody around the table wins.” Skilled facilitators can bridge departmental divides, drawing team members from diverse specializations together and empowering them to richly contribute to the planning process; one participant said that this is achieved in part by “[making sure] at the beginning that the decision making framework is flexible enough to allow for new ideas to enter in” and that “everyone who has a stake in that process is involved and informed.” One participant had a specific strategy they used to work creatively as a group with their team members: Scott Isaksen’s two-step creative problem solving process (originally published in *Creative approaches to problem solving: a framework for innovation and change*).

In addition to using visitor thinking and team building strategies, most participants noted that they rely on scholarship in other fields to inform their practice. One participant said “I devour visitor studies and all kinds of evaluation,” others mentioned scholarship related to learning, communication, psychology, and marketing. Two participants also noted that clarity of

formatting and design of the plan itself plays a large role in its utility. One participant described various tools such as matrices to show how different media deliver subthemes to audiences; the participant described designing communication tools like this as “time consuming,” but that they are “beautiful and useful” and allow the planner to easily pass the information on to a media developer.

In the context of strategies for success, most participants were asked if they believed that there are best practices of interpretative planning; all participants that were asked about best practices said that they believe that there are best practices, however most participants qualified their answer by say that they believe there are many different “best” practices. One participant spoke about best practices as follows: “I very much do believe there are best practices, having said that, I have to qualify because I truly do believe that every situation is different, the best practice in one situation is not the best practice in the next situation. And so, for me the best practice is not to say ‘this is the answer,’ the best practice is to say, ‘what is the answer we need in this situation.’” Best practices in interpretive planning are strongly grounded in demonstrated efficacy in practice. As one participant said, “I see ... a closer reflective loop than in a lot of museology, frankly; [interpretive planning]’s practices are based in what people try and what works.” Another participant said “‘best practices’ is defined by how you define best practice—the best practice that I use is based on the results of the outcome” and went on to say that “best practice evolves.”

Given that best practices of interpretive planning are a fluid concept—both in the sense that best practice will depend on the context and situation, and best practices shift and evolve over time—teaching best practices would seem to be a difficult undertaking. Participants, however, did feel that best practices can be taught. In context of best practices changing over

time, one participant said underlying “lattice work” does not change, “what changes is how we answer the questions.” Multiple participants referred to the planning process as answering a series of questions that are relatively unchanging. One participant said “it’s a process of questions. ... If you’re going to teach [interpretive planning], it’s going to have to be framed around exploring ... questions.” Another participant said that “you can teach a skilled planner by teaching the skills of what questions to ask and [a process that includes] gathering information, assessing, making decisions, and then implementing.”

In addition to teaching people the kinds of questions to ask, participants said that training needs to show people how to analyze and understand the answers to these questions. One participant said “the part that gets tricky is the interpretation of what you’ve learned in the analysis, and I think [that is] more based on experience and individual ability.” Another participant also noted that experience is essential to building skills in analysis and interpretation of the information that is gathered in the planning process, saying that “the programs that I’m most impressed with ... are taught as a practicum or as an intern practicum, because I think you have to have a real project. When it’s a fake project, ... you don’t have the constraints of time and budget. Those constraints are real, but they help you be more creative. ... It’s difficult to really understand all the nuances involved unless you’ve started to do it.”

When discussing teaching interpretive planning, one participant had this to say: “It’s really not a technical kind of thing, it’s a point of view, a point of departure, a set of blinders, and you wake up and see interpretation through a new lens that is armed with an intelligent understanding of what you’re trying to do. And that’s what a theory is, isn’t it, just a set of eyeglasses that shows you what to look at.”

Discussion of results and recommendations from planners and the researcher

The results of this study encompass the process of interpretive planning, the gaps between theory and practice, and the strategies for success that experienced interpretive planners rely upon. The key findings are as follows:

Process of interpretive planning

- ◆ “It depends” is a common refrain and no two plans the same, but the interpretive planning process is systematic.
- ◆ The process begins with gathering and analyzing information before making design recommendations.
- ◆ Key areas for inventory and analysis of information are a) interpretive resources and themes, b) visitors and community studies, and c) institutional resources and goals.
- ◆ The process that participants described shares similarities with ADDIE, the instructional system design model, with emphasis placed on the initial inventory and analysis of information from diverse sources.

Gaps between theory and practice

- ◆ There are many challenges, and planners cannot anticipate every difficulty.
- ◆ Challenges routinely arise around a) divergent goals for the project, b) differing understandings of interpretive communication, c) design recommendations being made too early in the planning process, and d) logistics of implementation and maintenance not being addressed.

Strategies for success

- ◆ Planning must always take into consideration the operational and institutional realities.

- ◆ Planners must engage in *visitor thinking* throughout the planning process in order to ensure that the plan results in a relevant and effective interpretive experience that embodies interpretive ideals.
- ◆ Planners must practice *team building* strategies in order to facilitate collaborative problem solving and build shared understandings of the project, its goals and purpose, and interpretive communication.

In discussing the strategies for success, the participants and I spoke about best practices. Overall, the participants agreed that there are “best practices” of interpretive planning, but best practices change over time and what is “best practice” in one situation may not apply in a different context. Merriam-Webster defines “best practices” as “a procedure that has been shown by research and experience to produce *optimal results* and that is established or proposed as a standard suitable for *widespread adoption* [emphasis added]” (Best practice, n.d.). Participants stated that there are multiple practices that can result in optimal results, and that each situation will call for a different approach. In light of interpretive planning’s flexible nature, I argue that “best practices” is not an accurate description of the standards for excellence in interpretive planning, and therefore, not the most useful construct to apply in order to increase our understanding of interpretive planning.

Interpretive planning is inherently fluid and practices change depending on the situation. In my opinion and the opinion of this study’s participants, a codified process or set of practices is not advisable. Instead, I recommend acknowledgement of the systematic and rational nature of interpretive planning. Consensus within the literature and across participants’ responses show that interpretive planning does follow a methodical sequence of steps. Acknowledging the

systematic nature of interpretive planning need not include prescriptive standards around enacting the interpretive planning practice; other fields, such as instructional systems design, have robust professionalization and acknowledged models without rigid practices that inhibit the creativity of the planning team. A model of interpretive planning that can be accepted across the field will need to provide sufficient scaffolding to accurately reflect the systematic processes of interpretive planning, but not so robust as to prove restrictive.

The participants of this study were able to articulate such models of interpretive planning that they had either internalized or made explicit through published texts and teaching. The participants were able to navigate their processes with flexibility by making judgements on how to enact the process in a given situation. To make these choices, the participants drew on a deep understanding of interpretation, the museum field, planning processes, and the unique context of a given project.

I believe that interpretive planning professionals and the greater museum field would benefit from a shared vocabulary and vision of excellence, an understanding of what success looks like in interpretive planning. The most common challenges that participants cited were related to understanding of project goals and interpretation; in many cases, I believe these challenges would be ameliorated by a clearer understanding across the museum field of what interpretation and interpretive planning are, and what they can and cannot do.

The participants in this study said there is a need for increased visibility and understanding of interpretive planning across the museum sector. Museums have engaged in visitor-centric rhetoric for decades; interpretation and interpretive planning are powerful tools for increasing museums relevance and efficacy. In order to talk about interpretation and interpretive planning clearly with professionals with different specializations within the museum field,

interpretive planning professionals must have a clear, shared understanding of interpretive planning. This study shows that there is a great deal of agreement across these interpretive planners' processes; the emergent themes around the interpretive planning process and strategies for success can be a first step towards key practices and values that are applicable across diverse contexts:

Key practices and values

In acknowledgement of interpretive planning's fluid nature as a practice, I have suggested that "best practices" is not the most useful construct. I do argue, however, that the museum field would benefit from the adoption of a widely agreed upon vocabulary and standard of excellence in regards to interpretive planning. I therefore suggest that the field of interpretive planning should move towards developing and adopting a heuristic set of key practices and values that is broadly applicable and represents the knowledge gained through practice and scholarship in the fields of interpretation and interpretive planning. The existing literature and the results of this research provide a foundation for such a set of key practices and values; for example, some key practices and values that arose from this research include:

- ◆ Interpretive planning is systematic;
- ◆ Interpretive planning values interpretive principles, including meaning, provocation, and engagement;
- ◆ Interpretive planning is a visitor-focused practice;
- ◆ Interpretive planning requires continual consensus building; and
- ◆ Decisions made throughout the interpretive planning process are evidence-based and require in-depth analysis of information gathered from a variety of sources.

I believe that an increased understanding of interpretation and interpretive planning will arise from two key areas: shared understanding of interpretive planning within its field of practices, and multiple avenues of dissemination that will reach across departmental silos and show how interpretive planning can unite organizations with shared purpose and goals. Reaching across departmental silos will require professionals to act as ambassadors for interpretive planning; this can be accomplished through personal connections, public presentations, or publications. Training and certification programs can also contribute to increased coherency in professionals' understanding of interpretive planning. The best training in interpretive planning will give professionals emerging in this field a strong theoretical understanding of interpretive communication, and focus on how to ask the right questions and how to analyze and understand the answers. I agree with participants in this study that the best way to provide this kind of training is through a combination of theoretical coursework and applied projects with real-world parameters and challenges. Additionally, efforts like NAI's *Standards and practices for interpretation planning* and the definitions project (www.definitionsproject.com) are significant steps towards increased understanding of interpretive planning.

Understanding of interpretive planning within its field of practice and across the museum field will also benefit from further research; this study is a small contribution to a growing body of literature, but there are rich areas for further investigation. Such research could include more inward-looking research, like this project, that examines the practice of interpretive planning and the various resources such as literature and training programs, and outward-looking research that assesses the impact of interpretive planning on the visitor, the institution, and the museum field.

Conclusion

The purpose of this qualitative study was to describe how interpretive planners navigate the gap between the guidelines put forth in the literature and practice when designing for informal learning. My research sought to answer the following questions:

1. How do interpretive planners describe the interpretive planning process?
2. What are the gaps between the guidelines and practice that interpretive planners encounter?
3. How do interpretive planners navigate those gaps?

This research centered on the process of generating an interpretive plan and how interpretive planners draw from diverse bodies of scholarship and their personal experience to inform their practice. It identified consistent patterns across highly successful interpretive planners' processes and described emergent consensus around "key practices and values," a term that I use in contrast to best practices.

This study drew from literature on interpretation, recent models of interpretive planning, and related areas of scholarship and practice. The study employed a qualitative approach and was descriptive and appreciative in nature. Data was collected through semi-structured interviews with seven interpretive planning professionals; participants were purposively selected based on criteria designed to ensure that participants were highly successful interpretive planners. The interviews were coded emergently to identify themes across the participants' responses.

The results of this study painted a rich picture of the interpretive planning process and how interpretive planners navigate the various challenges that arise. The findings were broken into four main areas:

How planners describe interpretive plans explored the nature of how interpretive plans are used, the value of interpretive plans, the history of interpretive planning in the museum field and the level of field-wide understanding of interpretation and interpretive planning. The key findings in this area were that interpretive plans are tools that help ensure that museums meet their goals, and interpretive planning has a complicated history in the museum field.

The interpretive planning process described the tasks and their sequence in the interpretive planning process; this section addressed the oft-repeated response to queries about the interpretive planning process, “it depends,” and highlighted commonalities across interpretive planners’ practices. The key finding in this area was that the planning process is systematic and shares similarities with other field’s planning and design processes.

Gaps between theory and practice addressed the challenges that arise throughout the interpretive planning process, from first steps through implementation. The key findings in this area were that there are many challenges in the interpretive planning process and some of the most common challenges include divergent ideas about the purpose of the project, differing understandings of interpretive communication, and various issues around implementation and maintenance.

Strategies for success showed how interpretive planners navigate those challenges and keep their interpretive planning project on the right course. The key findings in this area were that participants primarily focus on *visitor thinking* strategies and *team building* strategies when navigating challenges, and there are many “right” ways of doing interpretive plans.

Participants emphasized that the planning process is systematic, but not rigid. “Best practices” may not be the most useful construct considering the flexible nature of interpretive planning, but interpretive planners share a systematic, visitor-centered approach that is grounded

in the existing resources, capacities, and goals of the host organization. Through discussion of the results of this study, I identified the following key practices and values of interpretive planning:

- ◆ Interpretive planning is systematic;
- ◆ Interpretive planning values interpretive principles, including meaning, provocation, and engagement;
- ◆ Interpretive planning is a visitor-focused practice;
- ◆ Interpretive planning requires continual consensus building; and
- ◆ Decisions made throughout the interpretive planning process are evidence-based and require in-depth analysis of information gathered from a variety of sources.

The discussion of this study's result concluded with a call for more coherency in the understanding of interpretive planning within its field of practice and across the museum sector. I suggest that this can be achieved through increased training opportunities that marry theoretical foundations with hands-on experience, continued publication of works like NAI's *Standard and practices* and the definitions project (www.definitionsproject.com), and interpretive planning professionals acting as ambassadors that reach across departmental silos to communicate about their practice and its value to others in the museum field.

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Appendix A: Instrument

Consent Script

The purpose of this study is to describe how interpretive planners navigate the gap between theory and practice when designing for informal learning. I have five questions and expect the interview to last about 30 minutes. Your participation is voluntary and you can skip questions or stop the interview at any time without any penalty. I am digitally recording this interview, but only I will listen to the recording.

If you have any questions now or in the future, you may contact me via e-mail. Do you have any questions? Do you agree to participate in this interview?

Interview Script

We might bounce around my questions a little and might not get to all of them. I am primarily interested in your personal perspective and experience as a professional. Can you start off by just telling me a little about your career, just sort of a brief overview of your experience with interpretation?

- 1) How would you describe your interpretive planning process?
- 2) As you consider the various challenges in the interpretive planning process related to things like content development, applying best practices, working with others, and so on, what do you think are the most significant challenges?
 - a. How do you deal with these challenges?
 - b. What about how interpretation is perceived by other museum professionals, or outside the museum field?
- 3) As you face these challenges, what are the aspects of the interpretive plan that you feel are important to keep in focus?
 - a. How do you make sure to keep the interpretive planning project focused on those aspects? Any particular strategies you use?
- 4) Do you think that there are best practices for interpretive planning?
 - a. Can they be taught?
 - b. What are they?
- 5) What do you want to tell the museum field about interpretation or interpretive planning?

Thank you for your time! I'll share my thesis with you once it's complete. Do you have any questions, or is there anything else you'd like to tell me?

Appendix B: Coding rubric

INTERPRETIVE PLANS		
1	Value of interpretive plans	Return on investment for institution, results in visitor-friendly and interesting exhibits
2	Nature of how interpretive plans are used	"Decision making aid," "living document" "accountability device" "adaptive planning"
3	Lack of field-wide understanding	
4	Other	
RQ#1: PROCESS		
1	Sequence of steps in planning process	
2	Iterative inventory/Check decisions against inventory/Analysis	
3	Rationale/Logic-based process	"Logic" "Rationale for decisions" "driven by goals" "deliberate, follows criteria"
4	Plan looks different / "it depends"	
5	Underlying Qs remain constant(A), Other(B)	Planning process needs to continuously evolve, but remains systematic and the underlying Qs remain the same (5a)
RQ#2: GAPS / CHALLENGES		
1	Relevance/engagement for visitors	"Pound message home," Not thinking about visitors holistically, not planning for diverse audiences, not allowing for diverse experiences, getting too bogged down in "outcomes" vs. "goals" -- put our money where our mouth is on visitor relevance and engagement -- integrate visitor studies into exhibit development
2	Shared understanding of project(A), interpretation(B), planning process/value(C)	Developing themes/big ideas/goals for project, not understanding or "buying in to" interpretive communication principles or planning process
3	Recommendations without rationale	Media/design too early in process, plan to existing ideas, lack of analysis
4	Implementation	Costs and financial planning, client's capacity to research/write/develop fully, client's desire to implement recommendations
5	Other	
RQ#3: STRATEGIES / SKILLS		
1	Visitor thinking	Prototyping, holistic visitor experience, what is the goal vs. the outcomes, visitors "thinking their own thoughts" is success
2	Team building	Decision making strategies, shared vocabulary, working collaboratively to develop goals/big idea/message

3	Client needs	Operational and implementation logistic, institutional goals (reach new audience, grow attendance, etc)
4	Training, standards, and best practice	Best practices, theory/literature, courses or training programs, "interpretive plans should show intentionality" "XYZ are the components that should be in a plan"
5	Other	
OTHER INTERESTING COMMENTS		
1	As a field, need to remember to allow for open ended experience	
2	Role of interpretive planners is to be forward looking, futurists	
3	Visitors are "up for anything"	
4	Best practices are tricky, rather, what's the best approach in this situation	
5	Make brave choices and don't be fearful (of funders, public, field, etc think of your choices)	
6	Not many resources at start of career, had to make own process from piecing together other scholarship/People come into this field from a variety of backgrounds and piece together their own practice and vocabulary	
7	Interpretation a practice-based field and the best practices arise from what has been tried and shown to work	
8	Need for increased appreciation/visibility of interpretation	
9	Feel the joy of being understood	