Interpretive Planning Toolkit for Trails

National Trails Conference
May 2011
Overview

- Why and how was the Toolkit developed?
- Using tools and links
- The 8-step process
- Using the Toolkit on the Trail
- Improving the Toolkit
Why and how was the Toolkit developed?
For trail, byway, heritage area and site visitors
Thematic linkages among sites
Experiential connections
Relevancy
With trails, byways, heritage areas, and partners in mind

- Regional managers
- Site managers
- Interpretive specialists
- Beginners...
Customized use

- **Beginner**
  - Step-by-step

- **Experienced**
  - Skip around

- **Advanced**
  - Browse...and focus on LINKS
INTERPRETIVE PLANNING TOOLS FOR
Heritage Areas,
Historic Trails
and Gateways

Chesapeake Bay Office
Navigate the Interpretive Planning Process

Follow an eight-step process for interpretive planning, supplemented with examples, templates, resources and links, through this interactive website. This complements Planning for Success: An Interpretive Planning Toolkit for Heritage Areas, Historic Trails and Gateways. Explore this site for additional web-only tools as well as new and updated templates, examples, resources, and links, to facilitate regional and site-level interpretive planning. Navigate the interpretive planning process step-by-step, or search for specific tools.

There are three different ways to use this site:

- Browse the table of contents
  You can browse all the available tools and resources in this site via the table of contents.

- Complete Interpretive Planning Toolkit
  You can start by downloading the Interpretive Planning Guide PDF. This document provides the details and information you need to get started.

- Enter a search term to locate specific tools and resources
Using Tools and Links
Tools and links

- Within the toolkit
  - Fill out worksheets
  - Surf around
- Visit external links: websites, templates, and examples
  - Team-building
  - Successful partnering
  - Marketing plans
  - Surveys
  - Evaluation
PART 2 Preparing to Plan

How much will it cost?
There are many variables in determining the cost of a plan. A site-specific interpretive plan developed with the help of an outside consultant can run from $8,000 to $30,000 (cited 2009). A regional plan might cost $40,000 to $60,000, depending on the scope of work and complexity of the project. The higher rates assume that a contractor is conducting most of the work. Site visits, interviews, and facilitated workshops, which are labor-intensive and may require travel, increase the overall cost of an interpretive plan. The lower rates reflect more preparation, involvement, and coordination by staff. It is important to budget sufficient

with resources. Review and update the assets inventory before moving forward, then turn to page 30 for guidelines on creating an interpretive matrix.

Visit the toolkit website for examples of inventories that have been created as a part of planning initiatives.

Overview of the Interpretive Planning Process

There are eight main steps to creating an interpretive plan. The steps occur in sequence and build upon each other. Although some steps may overlap in part, others, like Step 3, “Engage the public,” continue throughout the process. The steps are:
1. Create the team.
2. Lay the groundwork.
3. Engage the public.
4. Develop interpretive themes and messages.
5. Assess and target audiences.
6. Develop visitor experience objectives.
7. Create an implementation plan.
8. Implement, evaluate, adjust, and celebrate.

Overview of the Interpretive Planning Process – The chart (following page) summarizes the planning steps, including who is involved and what is accomplished during each step. Each of the steps is discussed in greater detail in Part 3 of the toolkit.
Examples, tools and resources

**Tangibles, intangibles, universal concepts**

- **Tangible (Inanimate):** An Amish buggy; a plain Amish coat; an Amish child's Razor scooter
- **Tangible (Dynamic):** An Amish mud sale; traditions of plain dress; 19th century agricultural technology and practice
- **Intangible ideas, meanings, beliefs and values:** Amish religious philosophy; pacifism; strong community ties; mutual support
- **Universal concepts:** The quest for religious freedom; the role of technology in creating community

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**Tilden's Interpreting Our Heritage (1957)** is a good reference for novice and veteran interpreters.

www.naimembers.com

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**Tool #7, Stakeholder worksheet**

Use this tool to identify potential stakeholders and to plan a strategy for engaging them in interpretive planning and implementation.

<table>
<thead>
<tr>
<th>Potential Stakeholder</th>
<th>What interest does he/she/it have in the success of the plan?</th>
<th>How is this stakeholder linked to the regional/site interpretive plan?</th>
<th>When/how can we connect with this stakeholder? Who has best access?</th>
<th>Cultivation strategy</th>
</tr>
</thead>
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Source: Corporation for National and Community Service Resource Center, www.nationalservice.org
**Tools and Resources Table of Contents**

- Part 1: Introduction to the toolkit
  The printed toolkit can be used for regional interpretive planning – which involves multiple sites and organizations in designated regions such as trails, heritage areas, scenic byways and site-specific planning projects. To learn more about the printed toolkit, [visit this page](#).

- Part 2: Preparing to Plan
  This section of the printed toolkit provides an overview of interpretive planning, establishes the context for planning, and sets the stage for planning. Links are presented in this section of the website to offer external examples, resources and official tools for further exploration.

- Part 3: Interpretive Planning
  Part 3 of the printed toolkit details the eight steps of the interpretive planning process. This section of the website offers external examples, resources and official tools for further exploration of the eight-step process.

  The following examples, resources and tools accompany the eight-step planning process outlined in *Planning for Success: An Interpretive Planning Toolkit for Heritage Areas*,...
Step 2: Lay the Groundwork

The following examples, resources and tools accompany the eight-step planning process outlined in Planning for Success: An Interpretive Planning Toolkit for Heritage Areas, Historic Trails and Gateways. Download the toolkit (pdf) to learn more about interpretive planning and how to use the following tools.

Significance Statements: Resources and a Link


Interpretation Based Marketing Plans: Link


The Difference Between Mission and Vision: Official Tool

The 8-step Process
## Overview of the Interpretive Planning Process

<table>
<thead>
<tr>
<th>What are the steps?</th>
<th>Step 1: Create the team</th>
<th>Step 2: Lay the groundwork</th>
<th>Step 3: Engage the public</th>
<th>Step 4: Develop themes and messages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is involved?</td>
<td>Core team with the help of local advisors</td>
<td>Core team</td>
<td>Core team, partners, stakeholders</td>
<td>Core team, partners, stakeholders</td>
</tr>
<tr>
<td>What is accomplished/addressed?</td>
<td>The interpretive planning team is created with different categories of participant, each with clearly defined duties and responsibilities: • Core team members • Stakeholders • Partners • Subject matter specialists • Associated groups • Consultants</td>
<td>• Significance, mission/purpose/vision and existing plans reviewed • Management/program goals reviewed • Challenges and opportunities assessed</td>
<td>• Civic engagement and communication plans created • Civic engagement occurs: people share information and discuss issues and influences • Civic engagement strategies evaluated and revised when necessary</td>
<td>• Theme statements developed, reviewed • Partner-theme links established • Interpretive matrix created</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What are the steps?</th>
<th>Step 5: Assess and target audiences</th>
<th>Step 6: Develop visitor experience objectives</th>
<th>Step 7: Create an implementation plan</th>
<th>Step 8: Implement, evaluate, adjust and celebrate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who is involved?</td>
<td>Core team, partners, stakeholders</td>
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</tr>
<tr>
<td>What is accomplished/addressed?</td>
<td>• Study demographics, market research and visitor projection • Identify current and potential audiences • Address marketing strategies</td>
<td>• Visitors rights and needs articulated • Visitor experience objectives established • Measurable outcomes determined</td>
<td>• Matrix revisited and themes mapped • Interpretive strategy developed • Media assessed and selected • Supporting resources assessed • Action and evaluation plans created</td>
<td>• Plan reviewed, assessed, and revised • Implementation begins (with annual implementation plans as part of the process) • Evaluation and remediation continue • Milestones celebrated and showcased</td>
</tr>
</tbody>
</table>

*NOTE: Some steps overlap and often occur simultaneously, at least in part.*
Preparing to Plan: What is Interpretation?
1. Create the Team
2. Lay the Groundwork
Partners, Stakeholders, and the Public... 

...and Tips for collaboration
3. Engage the public
4. Develop the Themes
Star-Spangled Banner National Historic Trail

Purpose
Significance
Management Goals
5. Assess and Target Audiences
6. Visitor Experience Goals
7. Create an Action Plan
8. Implement, Celebrate...
...Evaluate and Adjust

• Programs and Initiatives
• Products
• The Interpretive Plan
• The Action Plan
Using the Toolkit on the Trail
Star-Spangled Banner National Historic Trail and Scenic Byway

- designated 2008
- MD, DC and VA
- 300-mile land and water trail
- commemorates nationally significant Chesapeake Campaign of War of 1812
- supports public access and water-based recreation
- co-aligns with Star-Spangled Banner Byway
- legacy of the bicentennial period
Sample interpretive strategy

- Themes with audiences
- Audiences with programs and resources
- Evaluate and prioritize ideas

### Sample Interpretive Strategy

Management Unit: A site along the Star-Spangled Banner National Historic Trail

**Theme A:** The military events in the Chesapeake Bay region during the War of 1812 were central to the outcomes of the broader three-year struggle between the United States and Britain that established America’s economic independence and military strength.

1. **Create Theme/Audience sessions.**

<table>
<thead>
<tr>
<th>Theme A</th>
<th>Theme A</th>
<th>Theme A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audience: On-site heritage Tours</td>
<td>Audience: School groups (4th and 5th graders)</td>
<td>Audience: Virtual visits</td>
</tr>
</tbody>
</table>

2. **Brainstorm ideas for effectively reaching these audiences.**
   Consider the site’s (or region’s) features or amenities, key messages, and visitor experience objectives.

   **Theme A – Heritage tours**
   - Living history programs – Brown House; Can Field
   - Touchable reproduction objects – visitor center
   - Film on War of 1812 events as site – visitor center
   - Boat tours – off Barrow’s Point
   - Encampment events and reenactments – Can Field
   - Hands-on military experiences – Can Field
   - Wayside exhibits – Chesapeake Trail; visitor center path

   **Theme A – 4th and 5th graders**
   - Guided ranger-led tours – Brown House; site trail; Can Field
   - Touchable reproduction objects – visitor center
   - Boat tours – off Barrow’s Point
   - Hands-on demonstrations – Brown House; Can Field
   - Travelling trunks – schools; other venues
   - Distance-learning programs – website; on-site
   - (Replica) weapons building workshops – education center
   - Military obstacle course – Can Field

3. **Evaluate and prioritize the ideas.**
   Criteria to consider may include feasibility, site of the audience reached, quality of the experience, accessibility and visitor safety, resource impacts or constraints, and alignment with management and program goals (note that some of the original ideas and/or venues listed above have been removed from the list below).

   **Theme A – Heritage tours**
   1. Living history programs – Brown House; Can Field
   2. Wayside exhibits – visitor center path
   3. Touchable reproduction objects – visitor center
   4. Encampment events and reenactments – Can Field
   5. Film on War of 1812 events as site – visitor center

   **Theme A – 4th and 5th graders**
   1. Guided ranger-led tours – Brown House; site trail; Can Field
   2. Touchable reproduction objects – visitor center
   3. Travelling trunks – schools
   4. Hands-on demonstrations – Brown House
   5. Distance-learning programs – website; on-site

   **Theme A – Virtual visitors**
   1. Period time-line – site’s website
   2. Interactive map depicting military movements – site’s website
   3. Facebook page – site’s website
   4. Period music podcasts – site’s website; Trail’s website
   5. Mobile web app – iTunes store
   6. Virtual tour – site’s website; Trail’s website
   7. Education center – site’s website; A historical society’s website
Creating the Team
Laying the Groundwork

- Comprehensive Management Plan under development
- MD War of 1812 Bicentennial Commission Strategic Plan
- Maryland Watertrails Plan
- Inventory of 600+ historic resources
- Signature events
- $1.8 million to develop Star-Spangled Banner Byway
- VA War of 1812 Commission activities
Engaging the Public

- Eight workshops in MD, VA and DC
- 30-day review of draft plan
- Follow-up with Interpretive Assistance Workshops
Almost thirty years after gaining independence, Americans resisted a land and water invasion by Great Britain, and military events in the Chesapeake Bay region became central to the outcomes of a broader three-year struggle that established a foundation for the United States’ economic independence and military strength.
Theme 2

- During the War of 1812, individuals in the Chesapeake Bay region endured great political, economic, and emotional upheaval and faced personal choices that profoundly impacted domestic life, influenced the evolution of U.S. government and commerce, and had ramifications far beyond the battlefield.
In the early 1800s, the Chesapeake Bay region – due to its central location on the eastern seaboard, network of navigable waterways, robust natural resources, and fertile agricultural lands – served as a hub for trade, industry and government, and thus, was a prime target for the British.
Theme 4

- The United States flag and “The Star-Spangled Banner” anthem – symbolizing the endurance of both the new nation and the American character – inspired a renewed sense of nationalism in U.S. citizens after the War of 1812, and endure today as potent international icons of the United States of America.
Assessing and Targeting Visitor Audiences

- Cultural heritage tourists
- Residents within 100 miles of the Trail
- Walkers and hikers
- Bicyclists (individuals and clubs)
- Water-based recreational visitors
- 4th, 5th, 8th and 11th graders
- Virtual visitors
Developing Visitor Experience Goals
Creating an Implementation Plan
Implement, Celebrate, Evaluate, and Adjust

Fall 2011: Interpretive Assistance workshops with Maryland Historical Trust
Sample: Education category

- Classroom-based programming
- New curricula
- Teacher training and tours
- Travelling exhibit
- Virtual resource center
- Teacher-ranger-teacher
- Inventory of plans and teacher resources
5. Improving the Toolkit
Explore the Toolkit and Send us your Tools!
suzanne_copping@nps.gov
interpretiveplanningtoolkit.org