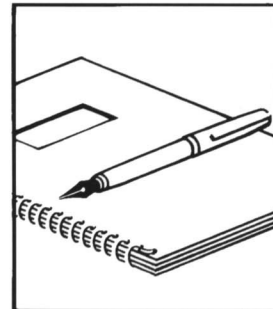# Heritage Notes

Planning for Heritage Resources

Planning Your Interpretation Programme

N. Christopher Robinson

Number 1

The interpretive plan is the basis for all programming. For example, at Rutherford House, Robbie Burns Day is an important event. It was celebrated by the original occupant of the house. Alexander Cameron Rutherford, Alberta's first Premier, was of Scottish descent.

Every heritage facility, whether a museum, interpretive centre or historic site, should have an interpretive plan as the basis for all its programming. In order to write this document, you must first understand what interpretation is and how it can best be done at your site. Many definitions of interpretation have been formulated. While they may differ in their applications, all agree that interpretation is a communication process whereby information, its meanings and interrelationships are conveyed to the intended audience. When this is done well, it can impart an understanding and appreciation of our heritage. In its

Interpretation Programme documents, the Historic Sites and Archives Service of Alberta Culture and Multiculturalism defines interpretation as:

any communication process designed to reveal the characteristics, meanings and relationships of Alberta's cultural heritage to the public through reference to objects, artifacts, landscapes, structures or persons.

In order to interpret your site fully, you should first acquire an understanding of its significance. Ask yourselves, "what are the

most important aspects of this historic resource; why should this resource be interpreted?" The answers to these questions will guide you, as the goal of your Interpretation Programme is to have your visitors appreciate and understand the uniqueness of your site when they leave.

Freeman Tilden, often considered the principal authority on the subject, established six principles of interpretation in his book, *Interpreting Our Heritage*. They will be helpful in preparing an Interpretation Programme for your site:

1. Any interpretation that does not somehow relate what is being displayed or described to something within the personality or experience of the visitor will be sterile.

2. Information, as such, is not interpretation. Interpretation is revelation based upon information, but they are entirely different things. However, all interpretation includes information.

3. Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable.

4. The chief aim of interpretation is not instruction, but provocation.

5. Interpretation should aim to present a whole rather than a part....

6. Interpretation addressed to children should not be a dilution of the presentation for adults, but should follow a fundamentally different approach. To be at its best it will require a separate program.

As for "why should this resource be interpreted", there can be many different answers. Interpretation is most often associated with resource conservation or protection activity. The resource (which is often a building) can be threatened with demolition or with deterioration through neglect, and only through its conservation and ultimate interpretation can it be saved. Usually it is only after this initial threat that the significance of the resource becomes known. Other resources, threatened or not, may have a widely acknowledged historical significance and may represent an important element in our provincial history. Because of these associations, interpretation of the site comes to be expected. It is seen as a natural stage in the development, or evolution, of the resource.

However, events or resources need not be "historic" to be interpreted. For example, the story of an industrial technology can be the subject of a modern interpretive centre. The principles of interpretation and the process for developing an Interpretation Programme are equally useful for the modern interpretive centre as well as the historic site.

The Interpretation Programme document will be the result of a thorough investigation into the interpretive potential of your site. Essentially, it will be the site's interpretive "master plan" and as such, will provide the direction for all interpretive development at your site. It should state:

1. the goals and objectives of site development,

2. the interpretive messages that will be presented based upon the historical facts uncovered,

3. the storyline which links the messages together,

The Interpretation Programme answers the question, "why should this particular site or story be interpreted?" The Frank Slide Interpretive Centre is located near the site of the 1903 avalanche and interprets the history of the Crowsnest Pass area.

4. the audiences that can be expected to visit your site, and

5. the methods of interpretive delivery and the resources necessary for a given level of interpretation.

This document will provide consistent, realistic and historically faithful direction to all parties involved in the development and interpretation of your site.

Interpretive Content

Although you have likely completed some initial research to assist you in determining the general value or significance of your site, it is now necessary to undertake more in-depth research which will help you identify exactly what is to be interpreted. While it is necessary to stress what is unique to your site, it must be

At Rutherford House, costumed interpreters demonstrate the way household objects were used in the house's interpretive time period of 1915.

Contemporary subjects can also be interpreted. The Ft. McMurray Oil Sands Interpretive Centre focuses on the history, technology and future of the Athabasca Oil Sands.

done within the Alberta context, so that the broad range of visitors to your site can relate to it more meaningfully.

No interpretation should be undertaken until research (historical, archaeological, architectural) has been completed, at least to a degree that will permit factual and accurate interpretation. As a steward of a historical resource, you have a moral commitment to truthfulness in interpretation. This is compounded when there is a commitment of public funds to assist with site development and interpretation.

It must be stressed, however, that research is an on-going process of investigation and discovery. Additional research undertaken after the opening will reveal additional facts that will contribute to the interpretation offered at your site.

The amount of research required, of course, varies for each site, though the elements are essentially the same. From the research, it will be possible to determine the thesis, themes and messages that will form the interpretive storylines to be delivered at the site.

Figure 1.
The interpretive matrix is a planning aid, representing the historical messages of the site.

All sites have their own unique story to relay, which is typically summarized in a paragraph as the site's thesis.
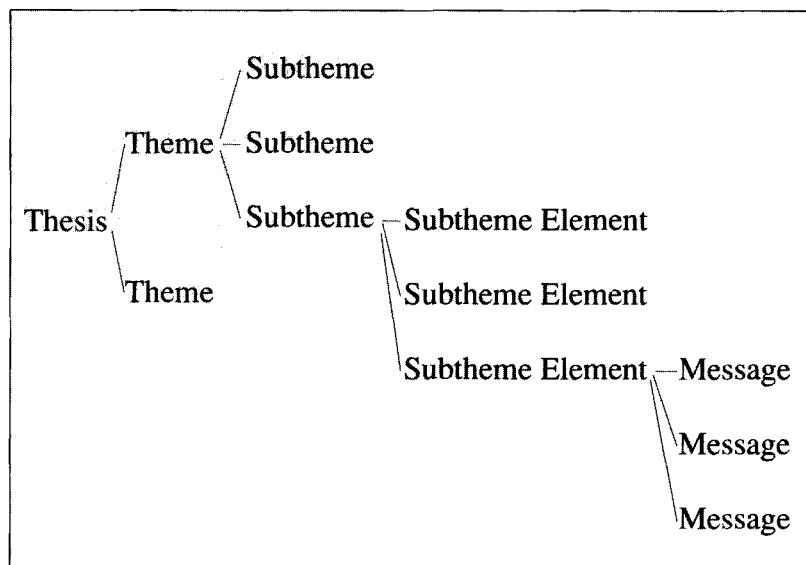
The thesis is then usually subdivided into themes, which are the central issues that will be addressed in all research and interpretation. To be most effective, themes should be stated as simple and specific sentences. For example, the thesis statement for Stephansson House Provincial Historic Site is as follows:

> The settlement patterns of Western Canada were determined, in part, by the needs and desires of the many different ethnic groups that settled on the prairies. The Icelanders who settled west of the Red Deer River desired to retain as much of their homeland language and culture as possible while accommodating themselves to their new situation. The Icelanders' dual identity was exemplified by Stephan G. Stephansson. A reasonably competent western Canadian farmer and community leader, he never lost his fierce loyalty to his mother tongue and its ultimate medium of expression, poetry.

This thesis is divided into the following six themes:

1. Icelandic Heritage.

2. Acculturation of Icelanders in North America.

3. Stephansson the Community Man.

4. Stephansson the Philosopher.

5. Stephansson the Poet.

6. The Dual Identity of Stephansson.

The nature of the research might dictate that the themes be divided still further, into subthemes and then subtheme elements, in order to represent their more complex components. Eventually, this hierarchy will be reduced to the messages or historical facts you wish to convey to the site's visitors. Each division of a theme provides more detail to the presentation. Figure 1 illustrates the subdivision of a thesis.

Remember that the various divisions of a theme should not appear as a series of separate facts. Instead, the messages should work together to present a cohesive story.

Personal delivery is the most flexible of the interpretation media for any type of site.

Interpretive Matrix

Currently, the Historic Sites and Archives Service of Alberta Culture and Multiculturalism uses an "interpretive matrix" as a planning aid to represent the historical messages, as shown in Figure 1.

The other elements which must be considered are identified and defined below. The list will provide ready reference to the information necessary for development of the individual interpretive presentations which will illuminate the thesis and themes identified for your site. That is, once the Interpretation Programme master document is in place, the information it contains is presented to your audience through the preparation and delivery of individual interpretive presentations or programmes. Note that the word "Interpretation" is used for the master document and "interpretive" for the individual presentations.

1. **Messages**: the message statements serve to identify more fully the specific subjects to be interpreted at the site.

2. **Relevant Resources**: the matrix indicates the resources that may be used to interpret

each of the messages. Additional research may be required to determine the exact nature, availability and source of appropriate resources. For example, if the life of an important historical figure were being interpreted, such resources as letters written and received, published written works, diaries, household furnishings and photographs would be very valuable.

3. **Appropriate Media**: suggests all possible media that may be appropriate in presenting the messages through the use of the "relevant resources". Examples of media would include signage, films or slide shows, exhibit cases, guided tours, brochures, special events, demonstrations, models and lectures.

4. **Audience**: identifies the type of audience to whom the messages are being directed.

5. **Constraints**: identifies those elements or variables that influence the delivery of the messages. This could include fiscal limitations, research availability, site characteristics and the number of staff or volunteers available.

6. **Selected Media**: identifies those media that will be used in the programme. Media

Elements of Alberta's historical development are interpreted at particular sites throughout the province. While the experience of the Ukrainian immigrant is the focus at the Ukrainian Cultural Heritage Village, the theme has relevance for all Albertans. This illustrates Tilden's first principle that interpretive efforts must relate to the visitors' own experience or interest.

would be selected based on your anticipated audiences, the relevant available resources, the messages to be presented and the constraints which have been identified.

Interpretive Goals and Objectives

The results of your research will help you to determine the interpretive goals and objectives of your site. That is, what it is that you hope to accomplish through interpretation of your site. While the words "goal" and "objective" are often used interchangeably, a distinction should be made between the two. Goals represent general statements of intent which a group hopes will be accomplished through interpretation. Objectives, on the other hand, are more specific. They are prescriptions for meeting the defined goals.

The following are examples of **interpretive goals**:

1. To inform the visitor of the significance and cultural context of the site.

2. To orient the visitor to the site's layout and components.

3. To develop an interpretive facility which promotes an appreciation for Alberta's multicultural landscape.

In contrast, here are some examples of **interpretive objectives**:

1. To interpret the life and times of the principal person associated with the site.

2. To develop guided tours at various levels of detail and complexity directed towards a full range of visitors.

3. To develop extension programmes that complement the school curriculum.

4. To provide informational brochures on the site for visitors to take home with them and read at their leisure.

Any of the objectives might also have sub-objectives. These provide the needed direction for development of the rest of the Interpretation Programme, as well as for the site itself. These objectives will also form the basis for site evaluations later on, by helping the staff to measure the success of the Interpretation Programme.

Audience Analysis

An additional element of the Interpretation Programme document is the audience analysis— a study of your actual and potential visitors. The more precise the audience determination, the greater the likelihood of offering interpretive presentations that your audience will appreciate, understand and enjoy. Such a determination will require market research, much of which can be undertaken by heritage groups themselves.

Like research, market analysis is an on-going activity, which can be initiated before your site opens but should also be monitored periodically after visitors start arriving. This information can be used to develop new programmes or to change existing ones to attract other people. If the market analysis is undertaken before the site opens, useful information may be obtained from other facilities or organizations in your area. If your site is already open, you can combine this information with that obtained from your own visitors.

There are many ways to segment your audience in order to make your interpretation efforts more meaningful. However, most market studies generally define visitor groups according to geographic, demographic and psychographic variables. Geographic analysis classifies audiences according to location of residence, and this can be by country, province, city or any other division which you define. With such information, you can determine the distance that visitors had to travel to visit your site. This in turn will affect how long they will stay as well as the services they will require. Demographic analysis categorizes audiences by such variables as age, sex, family structure, income and education. Each will have certain needs and interests which can be addressed in your interpretation. Psychographic analysis groups audiences according to such variables as their attitudes, behaviour, motivations, expectations and preferences.

Examination of the information obtained in these three broad areas will enable you to identify market segments which will likely be interested in your interpretive service. For example, you may find that most visitors to your site are parents in the 30-35 age group with two children under five years, that the parents are university-educated, live within a one-hour drive of your site, and are interested in learning of Alberta architecture and antiques. With this knowledge, you are better prepared to develop an Interpretation Programme which will meet the needs and expectations of your visitors, and you will also be able to direct your marketing and promotion activities to people who are likely to react favourably. Appealing to a specific audience will be more effective than approaching the public at large.

The Historic Sites and Archives Service of Alberta Culture and Multiculturalism has identified several universal categories for the classification of potential site visitors. Transient visitors are those people who come to the site while on their way somewhere else. Transiency is often the only characteristic that this group of visitors share. Because of this, their needs may be diverse, making it difficult to prepare interpretive presentations directed specifically at them. Non-transient visitors, on the other hand, plan in advance to visit a site. Visitors may also be divided into local and non-local types. Local visitors could be defined as those within an hour's drive of the site and non-local visitors, those outside that radius.

There are several broad audiences that can be expected to visit your site: special interest groups, school children, academic/university groups and the general public, which you can divide further for greater specificity with your audience analysis. However, the proportion of total visitation made up by each group will depend on the attraction your site holds for these individual audiences, as well as upon their proximity to it.

Visitors will come to your site for many different reasons: nostalgia, education or simply entertainment. Visitors may be attracted by actual or perceived conceptions of what your site can offer. Regardless of the reasons for attending, once a visitor has entered the site,

efforts should be made to make that visit memorable. Your visitor should be impressed enough to tell friends and neighbours about the site and to make a return visit.

To help determine which audiences your site can expect, it would be wise to survey other interpretive facilities in your vicinity, as well as any recreational facilities nearby. Additionally, it might be beneficial to know the population composition of the towns and cities in the area, as well as the traffic volumes that have been recorded for the highways providing access to your site. These measures can give an indication of the size of the audience pool from which your site can draw.

For example, Highway 2 between Calgary and Edmonton can expect between 12,000 and 20,000 vehicles daily from May through September. From this source alone, at least two million vehicles, or about five million people, can be exposed to a sign advertising a historic site. While many of these people may not be interested in visiting a historic site, if 10% of the traffic turned in, that is still a large audience pool.

The attraction of your site for school children will largely depend upon the relevance of the interpretive presentations offered to the school curriculum. Many aspects of it can be drawn upon: language arts, social studies, science and drama. The location of the site will also have an effect on the numbers of school children who attend. Since school children can normally only visit a site for the length of the school day, they are usually from the local area. Special interest groups, on the other hand, are willing to travel considerable distances to visit a site if it is perceived to offer insights into their area of interest.

Special events can bring the historic environment to life. Here members of the Edmonton House Brigade demonstrate their skill.

Interpretive programming can be tied in with the school curriculum, making the site an attractive field trip destination.

However, the largest audience group that most sites receive is "the general visitor". This group has a diverse composition and is essentially a catch-all category for those visitors who do not fit into the other audience groups identified. Careful studies of visitors to your site might allow you to define audiences in this category still further, allowing you to meet their specific needs. This can be achieved by asking such simple questions as "where are you from?" and "why did you visit?"

Before your site opens to the public, it is only possible to determine your audiences through analyses of existing and potential markets for your region and current market and tourism trends. You should be aware that these sources can present audience profiles that have only a limited degree of applicability to your specific site. However, they are useful in determining your marketing and interpretive strategies until such time as you can survey actual site visitors.

The following are some reasons for undertaking audience analysis or market research:

1. To help you allocate your limited resources (e.g. personnel, finances and time) in the best way possible.

2. To help you assign priorities for further site development and interpretive programming activities.

3. To help you meet future visitors' expectations.

4. To help you determine how many visitors you may expect, what market segments they represent and how best to market your site to them.

5. To assist you in your fund-raising activities.

Audience analysis should continue after your site is open, for in addition to the above benefits, it will assist you in evaluating your current interpretive programmes and activities and in expanding opportunities to reach current and future visitors.

Such site surveys need not be designed and administered by hired consultants. Much of the information that you require can be obtained by your own group, and government departments may provide assistance with survey design and administration as well as with analysis of the results. Even informal surveys can provide you with some insights into your real and potential audiences.

Interpretive Delivery

No matter what type of site is being interpreted, personal delivery should be used as much as possible. This is because it is the most flexible of the media available and is normally favoured by visitors to historic sites. However, with personnel costs as they are, unless the benefits are clear, non-personal methods can also be effective. Personal interpretive delivery should be complemented with other interpretive media, such as static displays, audio-visual presentations and take-away publications. If your site is a historic restoration, both the building and its landscape can be considered interpretive media. The restored environment will allow visitors to visualize and experience for themselves the appearance, configuration

In "first person" interpretation, the guide becomes an actor, wearing historic costume and demonstrating how life was lived at that particular site. It got its name because practitioners use the first person pronoun, I, in talking to the visitors. "After every meal, I heat up the water on the wood stove and do my dishes".

and functions of your site much more readily and vividly than verbal or pictorial representations would have allowed.

When considering personal interpretive media, interpreters can employ either a first-person or a third-person approach, or a combination of both. The interpretive content will primarily determine which style should be used.

With first-person interpretation (also called biographical role interpretation) staff play the roles of the people historically associated with the site during the interpretation era chosen. Of course, interpreters should be dressed in period clothing based on that worn by the individuals portrayed. This will support the roles being played as well as display their status, ethnicity and occupational variations. Obviously, this method would best serve a site interpreting the life and times of a specific person or people. However, in sites representing a specific era, first-person interpretation can also be used, though the activities, clothing, etc. would be representative of that time period generally, rather than of a particular individual. Visitors have to be made aware that first-person interpretation is being done at the site. Without this orientation, confusion may arise, resulting in an unrewarding and dissatisfying visit. First-person interpretation should only be attempted after a thorough and accurate historical account of the characters to be portrayed has been prepared. It is also important to use skilled interpreters who can convincingly play the part.

Third-person interpretation (also called narrative interpretation) involves interpreters telling a story rather than appearing to be living it. This, too, can be in generic period costume, though it is not necessary. This form of interpretation can be just as enjoyable and enlightening as first-person interpretation, and it requires less pre-visit orientation for the visitor.

Both types of interpreters can provide guided tours of your site, although, in order to be authentic, biographical role interpreters should only present tours if they coincide historically with their activities. They can, however, be placed at various stations along the tour offered by narrative interpreters. Self-guided tours are also popular, for they allow visitors to choose their own route through the site, as well as the length of each stop along the tour.

Regardless of the types of interpreter and tour used, visitors should be presented with opportunities for interaction with the historic environment, such as re-enactments of some regular activities which went on in the past at the site, special events or customs. In addition to reinforcing the experience through an appeal to many of the senses, activities can encourage return visits, for visitors can learn of the daily or seasonal changes in activities or events historically associated with the site.

When considering non-personal interpretive media, brochures, road signs, listening posts, slide-tape shows, display cases, text panels and scholarly publications can all contribute to your interpretive programme. When using non-personal media, there are some general guidelines which should be followed:

1. The text copy on interpretive panels should be divided into relatively small pieces, since these are much more likely to be read than a large expanse of text. As well, the information should be organized into a hierarchy of detail, possibly three levels. The first level contains enough information for the visitor to understand the essence of the message. Increasingly greater amounts of detail are offered through the higher levels.

2. Photos and graphics complement the views from the site, artifacts and written text. Graphic material might include maps, sketches, paintings or drawings of historical or contemporary origin. The photographs should be selected for their visual impact and quality, historical relevance, information content and the human interest they arouse.

3. The publications and "take-away" materials available at your site should be aimed at a variety of educational levels. They should elaborate on the themes dealt with at the site and some should act as guides through it.

Summary

Interpretation is a communication process that reveals the meanings and relationships of information, rather than a simple recitation of facts, through reference to appropriate environments, artifacts and persons. Interpretation for your site should be prescribed in the Interpretation Programme document and delivered through individual interpretive presentations.

Once you have determined that a site is worthy of interpretation, it is necessary, through research, to determine what specifically is to be presented and interpreted. Research presents the building blocks for the interpretation and also helps you determine the goals and objectives for the physical development of your site.

Before your site opens or develops its interpretive delivery approaches, it is necessary to get an indication of what audiences are likely to visit, in what numbers and what their expectations of your site will be. These can be determined through analysis of competitive and complementary sites, analysis of existing and potential audiences for your region, and analysis of current tourism trends. However, these surveys should be complemented with analysis of actual visitors to your site after it has opened, for such surveys will improve your ability to meet the needs and expectations of present and potential visitors.

There are many different interpretive delivery approaches available and the ones that you choose will depend upon your audiences, your interpretive content, available technologies, the physical constraints imposed by your resource and, ultimately, upon available financial and human resources. While both personal and non-personal media can have a place at your site, interpreters and guides are the most flexible and favoured of the interpretive media. Nonetheless, you should bear in mind that a well-done technical presentation can have more impact and drawing power than a poorly-done personal delivery; hence the need for staff training and thorough research upon which to base the interpretation.

In conclusion, you can successfully interpret your site if you have the following:
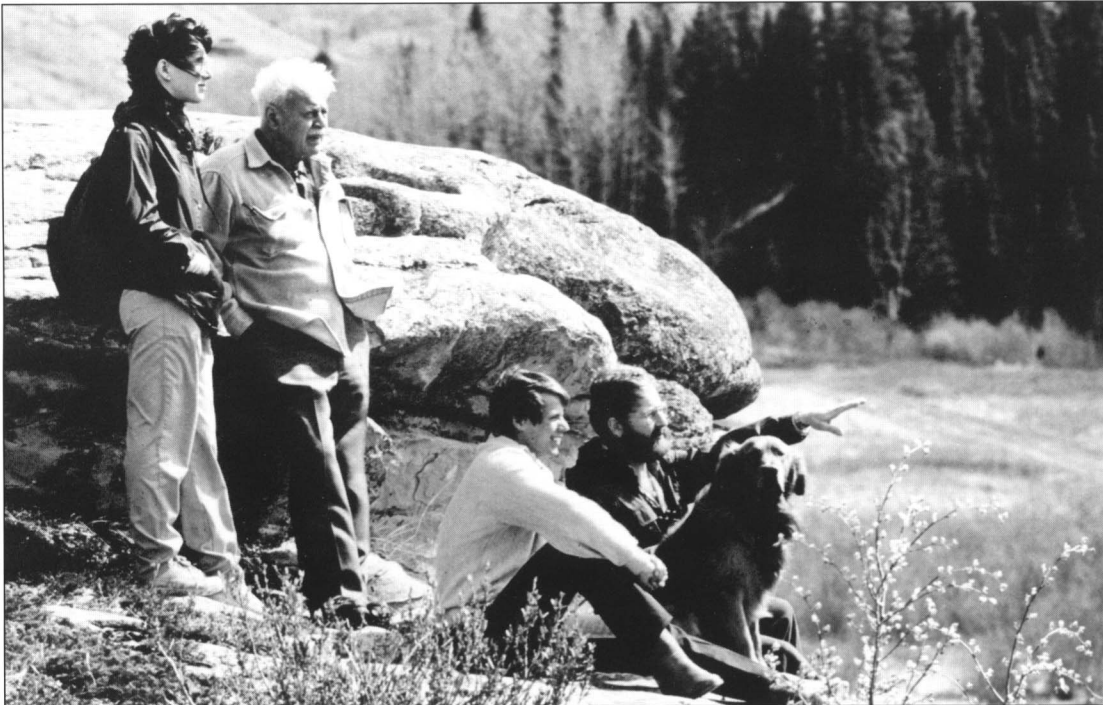
"Third-person" interpretation is an alternative method, perhaps better suited to natural history sites. The guide, who may or may not be in uniform, tells the story of the site rather than living it.
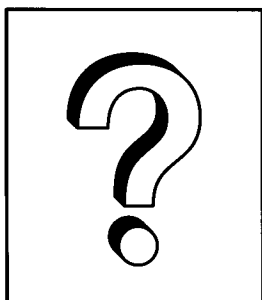
1. A dedicated staff.

2. Clearly defined goals and objectives.

3. An understanding of interpretation and the methods of interpretive delivery.

4. An appreciation of the necessity for research.

5. An understanding of your audience and their needs.

6. An awareness that evaluation and feedback are necessary. Remember, the work on your Interpretation Programme does not end when the doors open.

Preparation of an Interpretation Programme is an important part of the planning process. Once prepared, the document will help ensure that your site's history (or story) is interpreted appropriately, that audiences are reached and their expectations met, and that decisions on interpretation are co-ordinated and consistent. While elements to be considered in writing such a document have been outlined here, the form it will take is up to the individual group. There is no doubt that the exercise will be a challenging one for those involved, but the results will be rewarding.

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