



Natural Resources
and Environment

AGRICULTURE
RESOURCES
CONSERVATION
LAND MANAGEMENT

Best Practice in Park Interpretation and Education

**A Report to
the ANZECC Working Group on National Park
and Protected Area Management
Benchmarking and Best Practice Program**

By

Department of Natural Resources and Environment (Victoria)

**in conjunction with
Parks Victoria**

April 1999

Parks
VICTORIA

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**Prepared by
Earthlines consortium, Victoria**

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STEERING COMMITTEE

- Brian Doolan, Manager Visitor Use & Tourism, Natural Resources and Environment, Victoria
- Trevor Miles, Regional Manager, Parks Victoria
- Renae Carolin, Natural Resources and Environment, Victoria (Project Manager)

REFERENCE GROUP

- Peter King, Environment Australia
- Jane Liefman, Museum Victoria
- Malcolm Turner, Queensland Environment and Heritage & Great Barrier Reef Marine Park Authority
- Wendy Williams, Royal Botanic Gardens, Melbourne

THE PROJECT TEAM: AN EARTHLINES CONSORTIUM

- *Earthlines*: Randall Brouillette and Marion van Gameren
P.O. Box 128, Heidelberg West, 3081, Victoria, Australia
Phone (03) 9499 6659 Fax (03) 9499 7095 Email: rbrera@ozemail.com.au
- Burgell Consulting: Bob Burgell
- Spellbound Interpretation: Kate Armstrong and Pam Enting

CONTRIBUTORS

Thank you to the following organisations and interviewees who assisted and gave their time and support.

Organisation (ANZECC agencies in bold)	Contact
Parks Victoria	Brett Cheatley, Michael Howes, Rob Saunders, Paul Dartnell, Paul Schleiger Pam Fellows
Phillip Island Nature Park	Kirsten Thompson
Seal Rocks	Jim Wilson
Melbourne Zoo and Healesville Sanctuary	Gaye Hamilton
Scienceworks	Lynn Webber
NSW National Parks and Wildlife	Caroline Culey
Centennial Park and Moore Park Trust	Francesca Manglaviti
Olympic Coordination Authority-Park Management & Millenium Park	Carolyn MacLulich
Australian Museum	Gil Field, Ron Kawalilak
WA Department Conservation and Land Management	Fraser Vickery
SA Dept of Environment Heritage and Aboriginal Affairs	Pamela Harmon-Price
QLD Parks and Wildlife Service - EPA (formerly QLD Department of Environment and Heritage)	Malcolm Turner
Great Barrier Reef Marine Park Authority	Jim McDonald
Brisbane City Council	Doug Baird
Reef Biosearch (Quicksilver)	Lucy Sutherland
Brisbane Forest Park	Robin Macgillivray
NT Parks and Wildlife Commission	Fiona Peek
Environment Australia (Kakadu National Park only)	Sharon Lane
ACT Department of Urban Services	Geoff Lennox
Tasmanian Parks and Wildlife Service	Peta Dowell-Hentall
Forestry Tasmania	Dorothy Evans
Port Arthur Historic Site Management Authority	Raewyn Hutchings, Sonia Frimmel
New Zealand Department of Conservation	Hilary Chidlow, Alex Stone
Auckland Regional Parks	Jack Ricou
Parks Canada	

ABBREVIATIONS

Organisations

CALM	Department Conservation and Land Management Western Australia
DOC	Department of Conservation New Zealand
GBRMPA	Great Barrier Reef Marine Park Authority
NSWNPWS	New South Wales National Parks and Wildlife
PWCNT	Northern Territory Parks and Wildlife Commission
QDEH	Queensland Department of Environment and Heritage (now Queensland Parks and Wildlife Service - Environmental Protection Agency)

Other

ACT	Australian Capital Territory
CSF	Critical Success Factors
I/E	Interpretation and Education
KPI	Key Performance Indicator
SA	South Australia

EXECUTIVE SUMMARY

1. BACKGROUND

In June 1998, on behalf of the Australian and New Zealand Environment and Conservation Council (ANZECC) Group of Agencies, the Department of Natural Resources and Environment (Victoria) appointed a consortium headed by *Earthlines* to conduct a best practice and benchmarking evaluation of park and cultural site interpretation and education services. The project is part of the ANZECC Benchmarking and Best Practice program - an initiative of the National Parks and Protected Area Management Working Group to establish best practice standards and models for park and protected area management. The terms of reference for the evaluation focused on organisational processes - that is, what constitutes best practice in organising and managing the delivery of effective park interpretation and education.

The investigation comprised three elements:

- A survey of 35 organisations involved in the provision of interpretation and education (including all ANZECC Working Party agencies)
- A literature review
- A review of relevant business processes and systems

2. THE CURRENT STATE OF PARK AND PROTECTED AREA INTERPRETATION AND EDUCATION

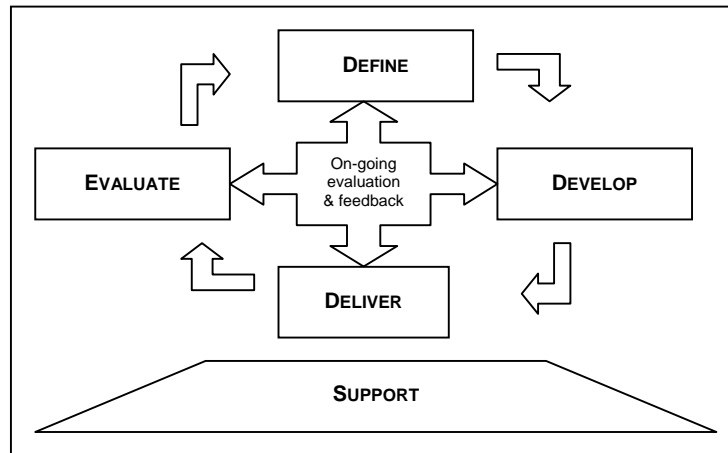
- 2.1 Most ANZECC partners and other organisations surveyed consider interpretation and education to be a core function even though the percentage of budget allocated to this activity is small.
- 2.2 The importance of the activity is reflected in organisational mission and vision statements. Most organisations reported that there was a clear understanding of the benefits of interpretation and education throughout their organisation, slightly stronger at senior levels than at site management levels. The number and diversity of programs cited indicates that interpretation and education is a vigorous and creative area of park management activity for most agencies.
- 2.3 There have been improvements in the last decade in specific aspects of interpretation and education management. However the translation of policy into action is often not systematic or integrated. No agency exhibited a clear and comprehensive system that aligns interpretation and education activities with corporate objectives, develops programs methodically and evaluates the factors critical to their successful fulfilment. The greatest gap is in ensuring that what is delivered on the ground actually contributes to organisational objectives.
- 2.4 The use of tools such as market research for understanding visitors has increased but no agency demonstrated a documented procedure for deciding which audiences to target, which messages and programs to deliver, and how to deliver them.
- 2.5 Agencies commonly set performance indicators for interpretation and education but the relevance of some of these indicators in terms of achievement of organisational objectives is questionable. In particular little effort seems to be directed towards measuring cost-effectiveness.

- 2.6 Agencies locate interpretation and education in various operational sectors of their organisation. Interpretation and education are not always integrated with other communication and visitor management functions.
- 2.7 Few of the organisations surveyed appear to have an effective evaluation program in place. Most appear to address only some components of the overall evaluation cycle.
- 2.8 Evaluation of education services for school audiences is a more common practice mainly because the formal education system requires it and has systems in place. The teacher in charge of the school group typically conducts these.
- 2.9 No organisation reported having a process in place to assess long term effectiveness of interpretation services while only a few have a process for assessing short-term effectiveness.
- 2.10 The extent to which outsourced providers are used varies across agencies. The success of outsourcing has been mixed, depending largely on whether a good market of viable providers exists and the diligence with which the park agency manages the selected providers' performance. Volunteers are a significant but generally minority means of providing interpretation and education. Tourism guides and operators are an increasing source of information and understanding for visitors to parks.
- 2.11 Decisions about the appropriate level of resourcing for interpretation and education must be made by each organisation depending on its objectives for the activity. The main scope for doing more informing with less probably lies in the areas of technology and innovation rather than divestment of delivery, to volunteers, the private sector etc.
- 2.12 Opportunities/recommendations for further investigations include:
- development of Critical Success Factors and Performance Indicators for interpretation and education services (or generic tools to assist agencies to do this)
 - investigation of visitor preferences and perceptions of programs delivered by Rangers compared to other field staff or contractors
 - development of criteria for determining levels of services, for pricing mechanisms and for deciding when to outsource, while also ensuring that key messages are delivered to key audiences.
 - learning from other government and business sectors how to measure the longer-term effectiveness of interpretation and education programs.

3. BEST PRACTICE

Best practice for organisations in park interpretation and education is:

- ⊙ Using the Model for Park Interpretation and Education developed as part of this project and integrating all the stages (Define, Develop, Deliver, Evaluate, Support) with other existing business systems currently operating within the organisation.



A Model for Park Interpretation and Education

DEFINING STAGE

- ⊙ Clearly defining the interpretation and education objectives and services of the organisation and linking them to its legislation requirements, mission statement and broader corporate objectives, usually in terms of one or more of the following:
 - increasing visitor awareness and understanding of the values under management
 - increasing visitor enjoyment
 - informing the community about the purpose and nature of parks
 - increasing community support for the organisation's programs
 - minimising visitor/neighbour impacts.

This depends on being clear about those interpretation and education services that are provided for their utility value (e.g. reducing visitor impacts, encouraging support for corporate programs), and those that are provided that have no utility value to the organisation but meet community service obligations to inform the public about its heritage assets.

- ⊙ Understanding that park interpretation and education operate increasingly in a business context of competing priorities where the benefits gained by visitors and the agency must equal or exceed the organisational resources used.
- ⊙ Integrating interpretation and education with other communication programs undertaken by the organisation including visitor promotion, corporate reporting and imaging.

DEVELOPING STAGE

- ⊙ Ensuring that clear objectives that address corporate goals are set for interpretation and education services and products.
- ⊙ Having integrated documented procedures for identifying programs, messages, target audiences and approaches to be used.
- ⊙ Using modern market research techniques to understand audiences.
- ⊙ Setting clearly defined measurable Key Performance Indicators (KPIs) and Performance Standards for the activities and products that are critical to the core business of the agency (Critical Success Factors).

DELIVERING STAGE

- ⊙ Ensuring interpretation and education staff and contractors understand all relevant corporate policies, objectives, targets, programs and performance standards and that that they are updated quickly following any changes to corporate targets.
- ⊙ Recognising the value of in-house staff in delivering interpretation and education - through their experience, commitment, expertise, custodial role and the positive public perception of park rangers - and efficiently harnessing and directing this resource.
- ⊙ Using outsourced providers to deliver core interpretation and education programs where the organisation will achieve a clear benefit in expertise, quality, efficiency or range of choice, not simply divestment of a responsibility.
- ⊙ Clearly assigning roles and responsibilities for all stages of interpretation and education, and capturing these in Performance Plans.

EVALUATING

- ⊙ Having an evaluation process for interpretation and education services that addresses all components of the evaluation cycle with clear links to Key Performance Indicators that address corporate targets.
- ⊙ Having a suitable method and systematic procedure for measuring the Key Performance Indicators.
- ⊙ Linking evaluation to performance assessment, including that of outsourced deliverers.
- ⊙ Learning from other government and business sectors how to measure the longer-term effectiveness of interpretation and education programs.

SUPPORTING

- ⊙ Having documented procedures to support communication, evaluation, data analysis and performance reporting.
- ⊙ Devising strategies to minimise the impact of organisational change on program development and delivery, such as quick transition processes, individuals assigned the responsibility for continuity, and procedures for hand-over of knowledge.
- ⊙ Identifying, training, monitoring and maintaining core skills for the interpretation and education service levels.

4. BENCHMARKS

Prescriptive and precise benchmarks for interpretation and education services are not appropriate at this time given the wide variation in the operating environments of the ANZECC agencies and the current lack of business operating systems for park interpretation and education. A number of examples of best practice are provided throughout Part 3 of the Report. These examples effectively represent benchmark performance for agencies operating under similar conditions.

5. CONCLUSION

Managers of national parks and protected areas have challenging responsibilities in regard to interpretation and education. Conserving natural and cultural resources and providing for visitor recreation are often the largest and most conspicuous management tasks. This investigation shows that interpretation and education are generally minor activities in terms of the resources employed yet important, core activities for virtually all of the organisations surveyed. Interpretation encompasses science, art, inspiration, ethnicity and belief, and as this investigation points out, it must justify itself in the business management terms of today. In the last decade tourism has become a larger part of the combination through the role of the guide. Good practitioners in this field must be part ecologist, part historian, part anthropologist, part artist and story-teller, and part market researcher. Increasingly they must also be partnership managers assisting providers such as educational institutions or tourism organisations rather than always delivering services direct.

The clients of interpretation and education are equally variable: sometimes “customers” wanting enjoyment and stimulation, sometimes “citizens” with the right to information about the values and condition of the areas being managed, sometimes “students” looking to be filled with knowledge. In other cases they are clients who want nothing, escaping to a park to encounter nature without the analysis or deconstruction that dominates most other aspects of life in the 1990s. Delivery must therefore be pitched at the right level - evangelism is generally inappropriate while policy pronouncements are likely to produce tedium rather than understanding.

Interpretation is an activity usually made up of many small activities - a guided walk, an information board or a nature trail. Field practitioners may be confident about the impact of these localised activities but this investigation suggests that organisations have difficulty

in knowing what they add up to - or, if they know the answer, they know it intuitively, not in ways that can be demonstrated or measured.

These challenges demand an uneasy mix of competencies for large organisations and the individuals in them: discipline about setting objectives, rigour about understanding clients and measuring effectiveness, all leavened with the creative freedom and support for the art of interpretation practice that results in a spark of insight and understanding among clients.

While many examples of best practice came to light during this investigation no one agency demonstrated mastery of this area of park management. The challenge for improvement remains for all ANZECC agencies. In the era of the “knowledge society” and a climate where the importance of community support and partnerships for viable park management is clear, most organisations are likely to recognise the need to give this improvement a high priority.

Part 1

BACKGROUND

1.1 Overview of the Project

PART 1: BACKGROUND

1.1 OVERVIEW OF THE PROJECT

In June 1998, on behalf of the Australian and New Zealand Environment and Conservation Council (ANZECC) Group of Agencies, the Department of Natural Resources and Environment (Victoria) appointed a consortium headed by Earthlines to conduct a best practice and benchmarking evaluation of park and cultural site interpretation and education services. The project is part of the ANZECC Benchmarking and Best Practice program -- an initiative of the National Parks and Protected Area Management Working Group to establish best practice standards and models for park and protected area management.

SCOPE

Definition

In the absence of any single accepted definitions for interpretation and education the following working definitions were adopted for the project.

Interpretation refers to information which has the objective of facilitating an understanding and appreciation of park assets and values whilst education refers to information directed towards students with the objective of increased knowledge for educational outcomes.

Education refers to the structured provision of information directed towards people whose primary objective is to learn about natural and cultural heritage and values.

(See Part 3, Section 3.4 Defining Stage for findings and recommendations in relation to definitions for interpretation and education.)

Objectives

The objective of the Project as stated in the Project Brief:

To use benchmarking to assess current practices for the delivery of interpretation and education services and make recommendations based on an assessment of best practice in the delivery of effective interpretation and education services.

Tasks

1. Conduct a review and brief report of current literature on interpretation and education services in parks and protected areas in order to identify the key trends in the delivery of these services.
2. Identify the processes by which each of the ANZECC partners agencies define, plan, deliver and evaluate interpretation and education services in parks and protected areas; identify significant examples internationally.
3. Identify methods used to determine appropriate types and levels of service and set performance standards for these interpretation and education services.
4. Identify performance measures utilised by agencies to assess the appropriateness of service levels and quality for visitor interpretation and education services, and to evaluate the usefulness of these performance measures in reporting at both the park level and the organisational level.
5. Review these processes against published models and frameworks used in planning and managing service delivery.
6. Recommend on the basis of tasks 1 – 5, the best practice processes and appropriate benchmarks for those processes, for delivery of park interpretation and education services and for monitoring and reporting on performance (at the organisational level) in the management of interpretation and education services.

For the purposes of this study, benchmarking for interpretation and education services was on the process level rather than on the input, output/outcome or combined levels (i.e. benchmarking investigated “how” the provision of services is selected, delivered, monitored and evaluated).

Identifying benchmarking standards needed to consider the varying experience and needs of visitors and the public and to consider organisational and budgetary constraints in the delivery of services.

The project scope was to investigate interpretation and education services across a range of agencies at the organisation-wide level rather than investigate any agencies in detail.

Since the survey (Appendix 1) and literature search (Appendix 2) did not find a suitable business model for park interpretation and education, a Model for Park Interpretation and Education was developed as part of the project. The investigation results are presented in Part 3 using the following five stages of the model:

- Define
- Develop
- Deliver
- Evaluate
- Support

Appendix 3 contains further descriptions of business model terminology and Appendix 4 contains best practice checklists for each of the five stages.

Part 2

METHODOLOGY

- 2.1 Introduction
- 2.2 Survey
- 2.3 Literature Review
- 2.4 Business Processes and Systems
- 2.5 Other Activities

PART 2.0: METHODOLOGY

2.1 INTRODUCTION

This part outlines the four phases of the project, the methodology used in the survey, literature review and business processes review.

The study was undertaken in four phases:

Phase 1: Data Collection

Three activities were undertaken:

- Surveys and interviews
- Literature reviews
- Business processes and systems review

Phase 2: Data Analysis

The following were prepared:

- Summaries of responses to the questionnaire and a spreadsheet for data comparison
- Report and summary table of key trends from the literature review
- Overviews of business process classification scheme

Phase 3: Data Synthesis

The following were developed:

- Summary of key findings for current practice
- Summary of key trends
- Development of a Best Practice business model

Phase 4: Application

Further analysis and integration of the data were undertaken to:

- Explore some key areas of interest – rationale, levels of service, outsourcing, evaluation and organisational challenges
- Prepare checklists for each of business cycle stages – defining, developing, delivering, evaluating and supporting

2.2 SURVEY

Participants

Thirty-five organisations that provide significant levels of interpretation and education services were invited to take part in the survey including all ANZECC members, leading urban parks, museums, zoos, and several private companies. The study focussed on Australian and New Zealand organisations and a small selection of overseas park agencies.

<p>10 ANZECC agencies (or their representative)</p>	<ul style="list-style-type: none"> • ACT Department of Urban Services • Environment Australia (Kakadu National Park only) • NSW National Parks and Wildlife • NT Parks and Wildlife Commission • Queensland Department of Environment and Heritage • Parks Victoria • SA Department of Environment Heritage and Aboriginal Affairs • Tasmania Parks and Wildlife Service • WA Department Conservation and Land Management • New Zealand Department of Conservation
<p>25 Non-ANZECC agencies</p>	<p>Australia</p> <p>Victoria</p> <ul style="list-style-type: none"> • Phillip Island Nature Park, Seal Rocks, Healesville Sanctuary, Melbourne Zoo, Scienceworks Museum, Melbourne City Council, Royal Botanic Gardens Melbourne <p>New South Wales</p> <ul style="list-style-type: none"> • Centennial Park, Olympic Coordination Authority - Park Management & Millennium Park, Australian Museum, Powerhouse Museum <p>Queensland</p> <ul style="list-style-type: none"> • Great Barrier Reef Marine Park Authority, Brisbane City Council, Reef Biosearch (Quicksilver), Brisbane Forest Park <p>South Australia</p> <ul style="list-style-type: none"> • Adelaide City Council, Earth Sanctuaries Warrawong <p>Tasmania</p> <ul style="list-style-type: none"> • Forestry Tasmania, Port Arthur Historic Site Management Authority <p>Overseas</p> <ul style="list-style-type: none"> • Auckland Regional Parks, Wellington Regional Parks, New Zealand • Parks Canada • National Parks Service, USA • British Columbia Parks, Canada • Department Environmental Affairs & Tourism, South Africa

A senior manager responsible for interpretation and education services in each organisation was approached and asked to nominate appropriate staff within their organisation. In some instances the managers also completed part of the questionnaire.

Questionnaire

The questionnaire (Appendix 1) was organised into sections covering:

1. The Organisation
2. Formal Requirements, Commitment and Policies
3. Planning
4. Implementation/Operations
5. Checking/Corrective Action
6. Responding to Change and Challenges

Organisations were sent the questionnaire in advance.

- 74% of questionnaires were completed via face-to-face or phone interviews

26% were covered via postal surveys:

- 50% of Australian postal questionnaires were completed and returned (3 out of 6)
- International input was secured through phone interviews and discussions with participants at the 1998 Heritage International Congress

Face-to-face interviews typically took 2 to 4 hours. Phone interviews typically took 1.5 to 2 hours.

Organisations were asked to provide copies of relevant documents identified in the questionnaire (e.g. their organisation's Mission Statement, Interpretation Policy and/or Strategy and/or Plan, if they had one). Not all organisations provided sample documents.

Limitations

- Wide variation in the organisations' structures and operations makes drawing of meaningful and valid conclusions more challenging – the reader should take care with one to one comparisons.
- Although every attempt was made to ensure that the person interviewed could provide an Agency wide perspective, this may not have been achieved in all cases.
- Very dynamic and changing environment – several respondent organisations are currently undergoing or about to undergo restructure.
- Comprehensive nature and extent of investigation required a lengthy questionnaire possibly limiting the thoroughness of responses in some instances.

Strengths

- Personal interviews facilitated the process of obtaining responses and allowed the questions to be explained and adapted to suit the organisation's situation.
- Many organisations commented that they found the process of completing the questionnaire and taking part in the survey a useful one from their perspective as it helped them identify where there were gaps within their organisation's systems, processes and documentation.

- *This was a useful process – we don't think in these terms.*
- *Comprehensive but long.*
- *Questionnaire was good to do. The questions have given pointers as to what to be doing.*

Typical comments from some survey participants.

2.3 LITERATURE REVIEW

In gathering material for the literature review, a wide range of international and Australian journals, books, conference proceedings and bibliographies were searched. The materials related to natural and cultural heritage, interpretation, environmental education, museum studies, leisure, recreation, heritage management, and national parks. The review concentrated on material after 1990 and only seminal pieces before 1990 were included.

The key search terms used were: *best practice, benchmarking, standards, performance indicators, strategy, funding, staffing, planning, delivery and evaluation.*

The complete collections of a number of Victorian libraries were searched.

During the survey, other reference material was also collected – mostly unpublished documents directly from Australian agencies.

In addition, a request for information was broadcast on the Internet bulletin boards of the following organisations and important contributions from agencies and individuals were received:

- Heritage Interpretation International
- Interpretation Australia Association education group
- Trinet (tourism)
- National Association for Interpretation
- The Society for Interpreting Britain's Heritage
- Heritage Tourism
- American National Park Service - Park Ranger
- International Society for the Advancement of Interpretive Communications.

Limitations

- The subject matter of this report appears to be infrequently researched or reported, particularly in Australia.
- Additional international material on this subject may be available but was unobtainable within the timeline.

Reports on the findings of the literature review have been incorporated into the Key Findings for each stage of the Best Practice model (see Part 3 of this report).

Appendix 2 contains:

- a table summarising the findings of the interpretation literature review
- the bibliography of interpretation literature surveyed

2.4 BUSINESS PROCESSES AND SYSTEMS

It was assumed that there would be limited formal, integrated management systems in place for planning, monitoring and evaluation of interpretation and education services. Formal benchmarking would also be of limited value given the considerable variation in management structures and operations across the ANZECC partners and other agencies making it difficult to make meaningful comparisons between processes.

A review of business literature was undertaken with a view to identifying best practice in terms of models and frameworks used in planning and managing service delivery in relevant areas other than interpretation and education services.

The objectives were to develop:

- A model of business process for ANZECC partners to enable sustained delivery of interpretation and education services
- An audit instrument for monitoring and evaluating business processes
- A customer focussed framework for end users

Reports on the findings of the business literature review have been incorporated into Section 3.3: A Best Practice Model.

Appendix 3 contains the bibliography of business systems literature reviewed.

2.5 OTHER ACTIVITIES

International Heritage Congress

A two hour workshop with 45 participants was conducted at the combined Interpretation Australia Association National Conference and the International Heritage Congress in Sydney on 31 August 1998. The session included a presentation about the scope of the project and small group workshops to identify key things an organisation needs for effective, efficient and equitable interpretation and education services. Participants included experts from all around Australia, USA, Canada, Scotland and New Zealand.

Steering Group and Reference Group Workshops

Two workshops were conducted jointly with the Steering Group and Reference Group. One was held at the start of the project to help identify key issues to address. The second was held after the surveys were completed to outline initial findings, discuss issues, review the proposed presentation formats for the final report and identify key questions to address in the Report.

Part 3

IDENTIFICATION OF BEST PRACTICE

- 3.1 How to Use Part 3
- 3.2 Organisational Profiles
 - 3.2.1 Key Findings
 - 3.2.2 Organisational Change
- 3.3 A Best Practice Model
 - 3.3.1 Key Findings
 - 3.3.2 Example
- 3.4 Defining Stage
 - 3.4.1 Key Findings
 - 3.4.2 Rationale for Interpretation
- 3.5 Developing Stage
 - 3.5.1 Key Findings
 - 3.5.2 Levels of Service
- 3.6 Delivering Stage
 - 3.6.1 Key Findings
 - 3.6.2 Outsourcing
- 3.7 Evaluating Stage
 - 3.7.1 Key Findings
 - 3.7.2 The Evaluation Cycle
- 3.8 Supporting Stage
 - 3.8.1 Key Findings

PART 3: IDENTIFICATION OF BEST PRACTICE

3.1 HOW TO USE PART 3

This part of the report contains:

Section 3.2: Organisational Profiles

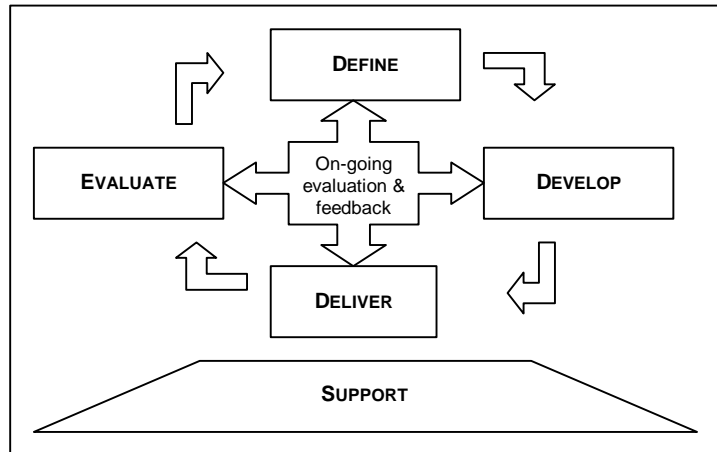
This section provides:

- the background information about the organisations that took part in the survey
- the context for development of a Best Practice Model for Park Interpretation and Education
- a brief discussion about organisational change

Section 3.3: A Best Practice Model

This section describes:

- the findings of the literature review in regard to business models
- the Model for Park Interpretation and Education that has been developed as part of this project
- an example to illustrate the use of this model



A Model for Park Interpretation and Education

Sections 3.4 to 3.8: Defining, Developing, Delivering, Evaluating, Supporting

These five sections elaborate on each of the stages of the model and analyse the data collected from the surveys, site visits, workshops and literature reviews.

Each section provides:

- a summary of what the stage involves and its connections to other stages
- best practice characteristics for that stage
- key findings
- a brief discussion on a topic related to that stage

e.g.

BEST PRACTICE

Best practice in DELIVERING interpretation and education is:

© Having clearly defined and measurable Key Performance Indicators.

Best Practice

The first page of each of these five sections lists the best practice characteristics for that stage.

Examples of best practice are also provided in the subsequent pages of each section.

Best practice examples illustrate practices that are innovative, interesting and identified as contributing to improved performance.

Best Practice Example 6

Set SMART objectives

Set SMART objectives where possible and indicate how each will be measured and evaluated.

SMART Objectives are:
Specific

Appendices

Appendix 1 provides a copy of the questionnaire.

Appendix 2 provides the literature review summary and bibliographies.

Appendix 3 provides elaboration and further tools to assist with understanding the Model for Park Interpretation and Education, business processes and terminology.

Appendix 4 provides best practice checklists for each of the stages of the model to assist agencies in the systematic assessment and development of a comprehensive system to manage interpretation and education services.

3.2 ORGANISATIONAL PROFILES

This section reports on the profiles of the organisations surveyed.

3.2.1 KEY FINDINGS

»»»» The organisations surveyed vary considerably in size and staffing allocation

- All ANZECC agencies interviewed manage 18 sites or more, from 131,000 ha up to 21 million ha.
- Of the non-ANZECC organisations, 1 manages 6 or fewer sites; 1 manages 19, and 1 manages 22 sites.
- Only 3 non-ANZECC member manage more than 6,000 ha (GBRMPA, Brisbane Forest Park, Auckland Regional Park).

nr = no response

ANZECC agency (Data as at August - Oct 1998)	No. of sites	Area (ha)	Total Visitors	Total Staff
NZ Dept of Conservation	3533	8,000,000	20m	1350
Environment Australia (Kakadu National Park only)	1	2,000,000	230000	68
QLD Dept of Environment and Heritage (now QLD Parks & Wildlife Service, EPA)	435	6,927,278	11.6m	1800 (875 - Park)
Parks Victoria	3164	3,760,000	32m	900
NSW National Park and Wildlife Service	367	4,553,084	nr	1700
SA Dept Environment, Heritage and Aboriginal Affairs	400	21,000,000	1.5m	300
NT Parks & Wildlife Commission	91	2,000,000	nr	166
WA Dept of Conservation and Land Management	263	20,260,961	8.1m	1300
ACT Dept Urban Services	52	131,000	1.63m	93

Organisations allocate their staff in varying combinations including separate staff for interpretation and education, combining both roles in one, and allocating a proportion of a staff member's time to interpretation duties (e.g. 20% of a ranger's time). The staffing figures supplied did not always accurately capture this difference. Further investigations would need to be made to gain a clearer understanding of staffing allocations to interpretation and education services.

ANZECC agency (Data as at August - Oct 1998)	Total number of staff	Full time IE staff	Part time IE staff	IE Casual/ Seasonal	IE Contractors	IE Volunteers
New Zealand Dept of Conservation	1350	80	40	30	10	Nr
Environment Australia (Kakadu National Park only)	68	3	Nr	7	4	Nr
QLD Dept of Environment and Heritage (now QLD Parks & Wildlife Service, EPA)	480	36	2	nr	Nr	Many
Parks Victoria	900	nr	Nr	nr	Nr	Nr
NSW NPWS	1400	5	115	nr	Nr	260
SA Dept Environment, Heritage and Aboriginal Affairs	300	nr	Nr	nr	Nr	Nr
NT Parks & Wildlife Commission	166	15	2	nr	10	6
WA CALM	1300	14	10	nr	Nr	20
ACT Dept Urban Services	93	1	34	nr	Nr	Nr

IE = Interpretation and Education

Many organisations operate within a business focussed context

The organisations surveyed operate under a wide range of business structures. Historically ANZECC agencies operated under the public service model whereas now only one-third of the ANZECC agencies operates within a public service model (ie a Government agency responsible both for policy/strategic direction and service delivery).

	Public Service Model	Purchaser/ Provider Model	Private/ Commercial	Mix of first three	Other
ANZECC	3	3	0	3	0
NON-ANZECC	4	0	2	2	5

Other structures include:

- 2 x Government Business Enterprise
- 2 x State Authority (reporting to CEO/Board to Minister)
- Board of Management reporting to Minister

Budgets for interpretation and education do not appear to match their core business status

The literature review and survey found government funding has become extremely limited – both in Australia and internationally.

It is apparent from the data that interpretation and education budgets are a small fraction of an organisation’s overall budget. Of the ANZECC members that responded to survey questions about budgets, most allocate less than \$500,000 to their interpretation and/or education operations and staff budget. One-third allocates less than \$100,000. Further investigation is required to validate this information.

Budget	\$0 - \$100,000	\$100,000 - \$500,000	\$500,000 - \$1 Million	Over \$1 Million
Interpretation Operations	2	4	1	2
Education Operations	3	3	0	2
Interpretation Staff Budget	-	5	1	1
Education Staff Budget	2	2	2	-

Interpretation and education is located in various operational sections

Survey responses revealed that agencies locate interpretation and education services within different sections/divisions, including:

- Corporate relations
- Community/Public programs
- Marketing
- Tourism and Community Services

There was no clear resolution from the investigation as to where best to locate interpretation and education. There are different perspectives on this issue. Some believe that the interpretation and education discipline will be diminished by integrating it with general corporate communication – that promotional and corporate imaging perspectives would crowd out interpretation and education. The Project Team acknowledges these risks but believes that on balance, failure to integrate interpretation and education (I/E) with broader agency communication programs is likely to result in inconsistencies between I/E messages and other communication activities, inefficiencies and lost opportunities.

Best Practice Example 1

Integrated communication

Best practice in integrated communication would be, for example, for an agency’s publications such as its annual report and promotional brochures to also project relevant interpretation and education messages.

3.2.2 ORGANISATIONAL CHANGE

The organisations surveyed have typically been restructured or undergone major change at least once in the last 10 years; some several times during this period. In line with 1990s approaches to organisational management, many agencies are assuming new organisational structures – purchaser-provider, centralised-decentralised, corporatisation etc.

There is some anecdotal evidence to suggest that the frequency and recent nature of organisational changes may be having a detrimental effect on the development of effective systems for the management of interpretation and education services. Some organisations commented that the frequency of change was in fact resulting in a lack of current policies and guidelines and holding up completion of strategies and plans. Those that had recently been restructured had not yet had time to set up new policies. Some organisations have had to develop their Performance Indicators in the absence of organisational policies and strategies.

Change will no doubt continue to be a reality for organisations. Sometimes these lead to loss of staff within the organisation, or re-allocation of staff from one section to another. Areas such as interpretation and education services that consist of relatively few staff within an organisation are particularly at risk of losing knowledge if staff leave. It is therefore important that systems are in place to record critical information and procedures. This especially applies to interpretation services that utilise seasonal staff as the staff turn-over rate is high.

Organisations need to become more adept at finding ways to maintain interpretation and education momentum and delivery in the face of, often inevitable, organisational change. Strategies for dealing with organisational change include:

- Having documented procedures for key interpretation and education services. Documentation means it is repeatable, can be more easily assessed (and improved) and can be used by others in the organisation.
- Supporting the maintenance of park interpretation and education knowledge. Interpretive knowledge is also held outside of park agencies. Park agencies could help maintain this knowledge and skill base by supporting professional associations for interpreters, such as Interpretation Australia Association (IAA). For example, an internet web site with an information bank could be set up under the IAA banner.
- Having someone with the responsibility of co-ordinating interpretation and education for the agency. This responsibility needs to be maintained especially through periods of organisational change.

Although large agencies with regional offices may have several interpretation and education staff, these staff are usually located one per region. Queensland Department of Heritage (QDEH) and CALM WA for example overcome this potential fragmentation by having a dedicated central co-ordinating officer with an advisory and support role which includes training and conveying the organisation's standards for interpretation and education materials and activities.

QDEH further facilitates the co-ordination of its interpretation and education activities via its Public Contacts Activities Committee. This committee of representatives from different sections of the Department meets quarterly.

3.3 A BEST PRACTICE MODEL

This section investigates the business models and processes used by organisations in relation to their interpretation and education services.

3.3.1 KEY FINDINGS

Interpretation and education needs to be managed systematically

Given that many agencies now operate within a business context and consider interpretation and education as core business, a business management system should be utilised to help ensure effective and efficient delivery of interpretation and education services.

No systematic, comprehensive business management system for interpretation services was found

While there is a growing interest to place interpretation and education services into a modern business context, no single agency has yet developed a systematic and comprehensive business systems approach to the management and provision of these services.

Some excellent examples of integrated management and planning approaches for interpretation services have recently been developed (e.g. Parks Canada 1997; Hall and McArthur 1996, 1998; Capelle 1998 for Parks and Forest Preserve Districts, USA; CALM, W.A.). However only partial systems for managing interpretation and education services are actually in place – no one system was found in any single agency that is comprehensive and deals with all aspects of the interpretation and education business cycle.

Relevant international management system standards were reviewed

Since no comprehensive business models for interpretation and education services were found to be in place, a review was conducted of business management systems literature.

This identified two relevant systems:

- The Australian and New Zealand Standard - Environmental Management Systems ISO 14000, 1996
- the Business Process Classification System developed by the American Productivity and Quality Centre

These international standards were used as the basis for development of the Model for Park Interpretation and Education.

BEST PRACTICE

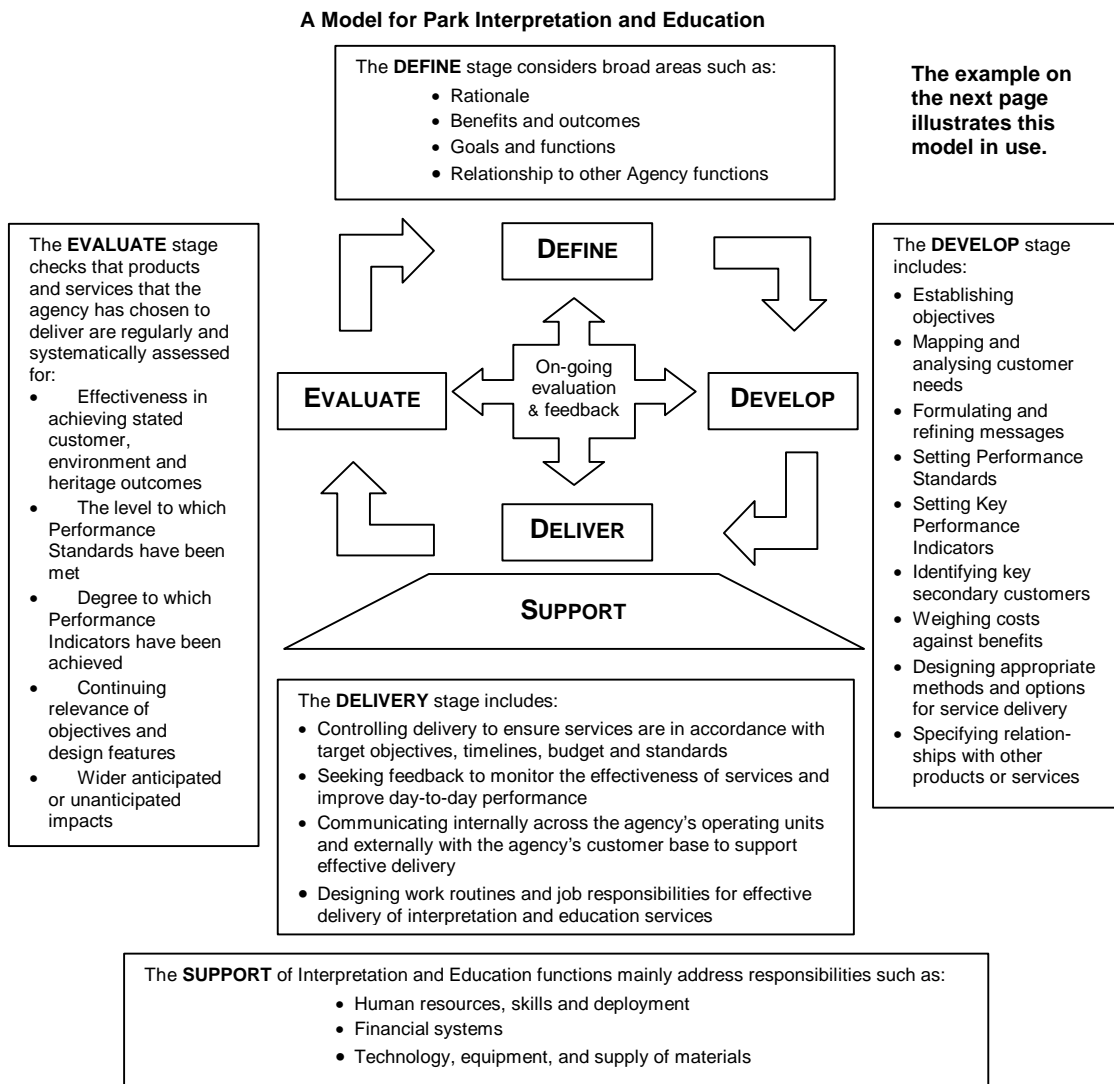
Best practice in BUSINESS MANAGEMENT of interpretation and education is:

- ⊙ Using a Business Model for Park Interpretation and Education.
- ⊙ Clearly defining the scope of interpretation and education within the organisation.
- ⊙ Maintaining the management system by regular reviews and audits.
- ⊙ Linking Performance Indicators to Core Business Process Competencies and Critical Success Factors.

►►► **A Model for Park Interpretation and Education was developed**

The international business systems that were examined comprised numerous steps that have been grouped into five key stages: Define, Develop, Deliver, Evaluate and Support. The model developed as part of this project serves as a tool to help organisations check that:

- all aspects of interpretation and education services are being addressed
- all the stages (Define, Develop, Deliver, Evaluate and Support) are **integrated**



While each of these five stages has been depicted in the above two-dimensional model as discrete elements in the delivery of services, the reality is not like this. There is a considerable overlap in the functions of each stage and the stages do not necessarily occur in the order depicted in the model. Another way of visualising the stages is to see each of them as concentrated points of similar activity rather than categories with highly defined boundaries.

On-going evaluation and feedback between all five stages

The model emphasises the highly interactive feedback amongst all five stages of the business cycle. Decisions, outcomes and activities in any one stage influence each of the other stages, not only from one stage to the following stage, but also between all stages. The management processes in any one stage therefore need to take account of what has been decided at a previous stage and/or what needs to take place at a subsequent stage. For example, the assessment of an interpretation product in the Evaluation stage requires that related activities also occur at the Developing and Delivering stages. The results of the Evaluation stage then need to be reported so that they can influence and improve the Defining of interpretation services for the organisation. This completes the evaluation cycle and makes it meaningful.

The Evaluation stage focuses on the activities and elements specified in its description box in the model diagram. On-going 'evaluation' and feedback also occurs at and between all stages (See also Section 3.7 Evaluation Stage).

3.3.2 EXAMPLE: A NEW INTERPRETATION AND EDUCATION PROGRAM FOR ARID NATIONAL PARK

Systematic business management thinking, combined with the other creative disciplines essential to interpretation and education, are important to ensuring effectiveness. The following hypothetical example shows how the Model for Park Interpretation and Education is applied to identifying best practice and setting standards.

Hypothetical Example

Two of the major strategic directions for a State park management agency over the next three years are to improve on-ground environmental management - such as re-establishing ecological fire regimes and controlling pest plants and animals - and increasing customer satisfaction across the State. Wildfires originating in the infrequently visited Arid National Park threaten surrounding land holdings and trigger a debate about the soundness of the park's management. Local staff are drawn into a public debate about management practices.

The Solution

Regional staff agree that they must develop a new communication program that interprets the values of the park, explains the management approach to protection, and encourages people, especially the local community, to 'own' the park by visiting it more.

STEP 1

The agency acknowledges that the design of this new program must be based on the four **Core Business Process Competencies** it has previously agreed should infuse all interpretation and education activities.

Core Business Process Competencies

These competencies involve agency commitment to:

- **Protection of the Environment**
- **Customer Service**
- **Product Innovation**, and
- **Cost Effectiveness**

(See Appendix 3)

STEP 2

The Model for Park Interpretation and Education is used to understand in which phase of the agency's business cycle the best practice for developing a new approach is to be found. In this case it is the **Define** and **Develop** stages of the business cycle. The Define stage involves being clear about benefits and outcomes and relationships with other functions. The descriptors (see model on previous page) for the Develop stage indicate that best practice has a strong emphasis on formulating messages, understanding customer needs, weighing costs and benefits, matching messages to audiences, and ensuring customer satisfaction.

STEP 3

With two main outcomes - improved environmental management and better understanding through greater visitation - regional staff meet and agree on the nature and goals of the program with the head office personnel who have the responsibility for **Defining** the agencies strategic direction for these two areas. It is agreed that getting support and awareness of the Arid National Park's environmental issues and visitor opportunities is significant in Statewide terms and the communication program can provide a model for other parks.

STEP 4

A review of the agency's management information reveals that 10 years ago in another park a management program to reduce kangaroo numbers dealt with similar challenges. The **Support** functions within the agency provide crucial management information about which strategies worked at that time.

STEP 5

Regional staff responsible for developing the communication program approach it as a **Business Process** (page 78, Appendix 3). They identify the key **inputs** necessary and how they will be converted to **outputs** that result in **increased awareness of management strategies** and **customer satisfaction**. This ensures that they do not see inputs - e.g. filling a new interpretation officer position or holding a stakeholder meeting - as ends in themselves.

STEP 6

At this point the **Business Process Classification** (page 79, Appendix 3) is useful for guidance. Categories 2, 3, 4 and 5 are relevant (Understanding markets and customers; Developing vision and strategy; Designing products and services). This helps identify the inputs and other factors that need to be considered.

In this case, the primary background inputs that staff drew on to commence the project were:

- A clear **interpretation and education mandate**
in the form of a Ministerial Statement which set out a government commitment to promoting the environmental values of all protected assets managed by the agency and encouraging visitors to all sites.
- An **environmental inventory**
that documented that the park has significantly high populations of restricted flora and fauna and therefore has demonstrated unique environmental values.
- **Customer research**
undertaken by the region and head office which showed that:
 - older “off the beaten track” visitor segments would be prepared to visit the Arid National Park during the winter months.
 - potential local visitors were most interested in camping opportunities and active recreation.
- **Media monitoring data**
that showed most concerns about the park’s management were coming from immediate neighbours and farming industry organisations.

STEP 7

The next task is to examine the planning and development activities the regional staff put in place to convert the above **inputs** into the **outputs** that increased community understanding and visitor use. This involved the following elements and outputs:

- Interpretive staff provided the agency’s regional environmental manager with materials and presentations for a series of workshops, park inspections and one-to-one meetings with neighbouring landowners explaining the environmental management strategy.
- A series of signboards were established in the park interpreting values and management strategy.
- Editorial material was supplied to publications for the seniors market promoting winter visits.
- Articles and stories were supplied to regional and metropolitan newspapers about the special values of the parks, protection strategies and how to visit.

While the use of electronic media and paid advertising would have extended reach it was not used due to high cost.

The customers for whom these outputs are intended are examined in this step. It is useful to consider them as **primary customers** and **secondary customers**.

Customer Definitions

Primary customers are the people whom the staff are encouraging to understand and/or visit the arid park. In this case study these visitors or potential visitors are neighbours, seniors, residents of towns near the arid park, and other capital city residents.

Secondary customers are people in the business chain who receive the outputs of the local staff, make further changes or conversions to these outputs and then direct the refined outputs for the benefit of primary customers. In this case study, secondary customers include the regional environmental manager and newspaper journalists.

See Appendix 3 for additional examples.

STEP 8

The next step identifies and describes the evidence and information that shows that the Arid National Park communication strategy is successful. The goal has been to increase support for park management and increased and satisfied visits.

To establish how successful the strategy has been, measurable criteria called **Key Performance Indicators** need to be developed. It is critical that the KPIs are relevant. While increasing the public’s general appreciation of the values of Arid National Park is desirable it is not the key issue here. The program was established to increase the support for management of those values, particularly by the local community, and maintain that support by first-hand knowledge through visiting. Therefore the KPIs adopted must answer whether that has been achieved.

The Key Performance Indicators chosen were:

- Gaining acceptance of the park's environmental management strategy by local stakeholders.
Correspondence with stakeholder groups and neighbours after the meetings showed acceptance of the strategy subject to modifications regarding annual consultation about burning programs.
- Visitor increase and understanding.
Traffic counters show visitor numbers increased by 15% in the year after the program. A survey of park visitors showed half the increase is in the 60s plus segment. Visitors express high satisfaction with interpretation services. No practical way to measure understanding by visitors is found except for school groups via teachers' comments. Intention to revisit or recommend to friends meets average for other parks in the State.
- Community awareness of values, management response and visitor opportunities.
Regional papers carry a 90% increase in positive stories about the Arid National Park.

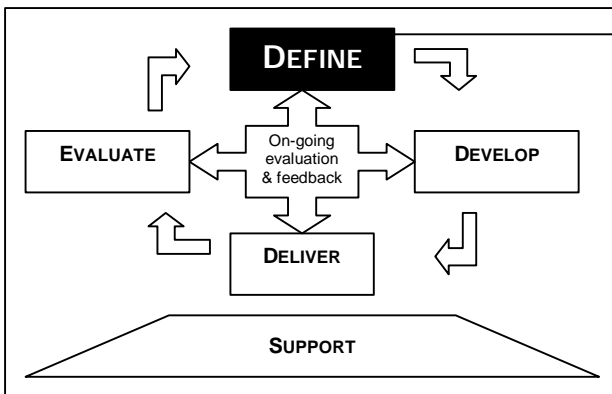
STEP 9

The analysis of the program is written up in a standardised manner so that it can effectively act as a guide to other parts of the agency wanting to address similar interpretation and education challenges. This evaluation is transmitted to those parts of the agency responsible (see Step 3) for defining strategic directions as an example of the integration of interpretation and education into corporate objectives for environmental management and visitor satisfaction. The issue of how to measure visitor understanding is listed for discussion at the next annual interpreters' practice workshop, a **Support** function. Finally the project is reviewed again to validate that this example has captured the **Core Business Process Competencies**.

3.4 DEFINING

This section investigates why organisations provide interpretation and education services and how these services help them achieve corporate goals and objectives.

- Are there legal and policy requirements?
- What are their guiding rationales and levels of commitment?
- What are the benefits in terms of achieving goals?
- Are customer needs understood?



A Model for Park Interpretation and Education

The DEFINING stage of the business cycle addresses how the organisation defines its interpretation and education services in relation to the organisational mandate, mission, business rules, policies and operating parameters.

If the legislation or the mission statement or charter derived from this is not clear in regard to the requirement for the provision of interpretation and education services, then the agency should take action to clarify the situation. This could include the agency identifying ambiguities in legislation to Parliament or its Minister, and recommending a solution.

A definition for interpretation

The quest for a universally accepted definition of interpretation continues. The literature reveals that a number of agencies in Australia and internationally have developed and adopted their own definitions of interpretation, occasionally using terms like 'information', 'education' and 'communication' instead of interpretation. Within some agencies there has been a deliberate shift from park-based interpretation to a broader approach. Several embrace community education that addresses natural and cultural values.

This stage considers broad areas such as:

- Rationale
- Benefits and outcomes
- Goals and functions
- Relationship to other agency functions

BEST PRACTICE

Best practice in the DEFINING stage of interpretation and education is:

- ⊙ A clearly identified rationale for providing interpretation and/or education services that is linked to the legislative requirements and the organisation's mission statement. (See Best Practice Example 2).
- ⊙ Shared commitment throughout the organisation and a clear understanding of interpretation and education objectives.
- ⊙ Integration of interpretation and education services into the organisation operations for communication and visitor management.
- ⊙ Involving the community in defining interpretation and education goals for the organisation. (See Best Practice Example 3).
- ⊙ Clarifying the mandate for providing interpretation and education if it is not currently clear or workable.

Refer also to Checklist for Best Practice: Defining, in Appendix 4.

In terms of this investigation the focus is not on providing a universal definition of interpretation and environmental education but rather on defining how an agency's interpretation and education services will help achieve or contribute to the achievement of the agency's overall goals and objectives. Best practice for ANZECC agencies is to examine existing definitions (including those provided by the professional organisations for interpreters and environmental educators, see page 22) to guide the development of a suitable working definition for their agency.

3.4.1 KEY FINDINGS

The survey and literature review found that the major reasons organisations undertake interpretation and education services are because they:

▶▶▶▶ Have a legislated responsibility to provide these services

Most survey participants (78%) believe they have a legislated responsibility to provide interpretation and/or education services. However the transfer of the legislative framework to practice and the decision between core and non-core functions is not always straightforward.

▶▶▶▶ Consider it is core business

All but one of the of survey participants (96%) regard interpretation as core business.

Most organisations surveyed (ANZECC agencies 78%, total 96%) regard interpretation as 'Extremely Important' or 'Very Important'.

Almost all of survey participants consider interpretation one of their 4 or 5 main functions (96%) and most also consider education to be a main function (74%).

When asked to rank six listed functions for interpretation and education, organisations listed their top three in the following order of importance:

1. 'Increasing visitor awareness and understanding of park/site values' (The overwhelming favourite)
2. 'Increasing visitor enjoyment'
3. 'Increasing community support for the organisation/park/site'

Other reasons include:

4. 'As a management tool'
5. 'To change visitor behaviour'
6. 'For commercial reasons'
7. 'To foster community support for environmental protection and encourage community action to protect the environment'
8. 'To communicate messages of corporate priority'
9. 'To increase visitor understanding in order to make informed decisions'

▶▶▶▶ Benefit from these services

Many organisations have identified the benefits interpretation and education provides to their organisation (see 3.4.2) and indicate that most senior managers (78%) have a clear understanding of these benefits.

▶▶▶▶ Organisational Mission and Policy statements frequently include interpretation and education

Many organisations now have a mission or vision statement (77%) that includes reference to interpretation and/or education. These, together with corporate plans, identify interpretation and/or education as a key activity. The transmission of this intent to actual policies has become more common over the last decade.

Many organisations (89% of ANZECC agencies, 61% total) now have a documented policy specifically for guiding interpretation and/or education whereas few agencies had them in the early 1990s.

Some organisations (30%) also have a formal documented commitment to a level of service for interpretation and/or education such as a guarantee of service charter.

▶▶▶▶ There is not always commitment to interpretation and education across an organisation

While most senior managers and interpretation and education staff have a clear understanding of the benefits of interpretation/education to the organisation, these are less clearly understood by site managers (48%) and planners (44%).

The translation of interpretation and education support from senior managers to actual delivery by interpretation and education staff may be being hampered by lack of communication of its benefits to site managers and planners. As a consequence interpretation may not be adequately resourced at the site level or not adequately incorporated into plans.

Definitions

Interpretation is a means of communicating ideas and feelings which helps people enrich their understanding and appreciation of their world, and their role in it.

Interpretation Association Australia

Environment education seeks to develop an understanding of the interrelationships between the elements of the local environment, positive attitudes towards it and skills which will enable people to actively engage in promoting its wellbeing

Environmental Education Association of Australia

3.4.2 RATIONALE FOR INTERPRETATION

Two major reasons respondents provide interpretation and education services are legislative requirements and the direct benefits derived from these services.

Several ANZECC agencies provide a rationale for interpretation in their interpretation manuals. Agencies sometimes identify interpretation goals, outcomes or benefits for visitors as well as for the agency (see QDEH example opposite).

In some cases the visitor outcome identified is what the agency wants (e.g. 'to develop an appreciation of environmental and management issues relating to the park') and is unlikely to be what the visitor is purposefully seeking from their visit to the park/site.

Additional benefits from particular interpretive programs can be:

- enhanced corporate image
- fewer visitor safety incidents

When selecting performance indicators for interpretation it is critical that they are relevant and measurable in terms of the key interpretation outcomes set for the organisation. The outcomes must be achievable. How likely is 'a change of behaviour' to result from a one hour interpretive activity?

One approach for an organisation to use to clarify their rationale for interpretation and education services is to conduct a risk assessment to identify what the organisation would lose if it did not offer interpretation and education services.

McArthur and Hall (1996) note that currently heritage managers use interpretation to achieve a number of objectives such as:

- enriching visitor experiences
- assisting visitors to develop a keener awareness, appreciation and understanding of the heritage site being visited
- accomplishing management objectives through encouraging thoughtful use of the resource by visitors, including reducing the need for regulation and enforcement, and carefully distributing visitor pressure to minimise impacts to fragile sites
- promoting public understanding of heritage managers and related programs

Best Practice Example 2

Benefits of Interpretation

For people visiting heritage places:

- personal needs for information and explanation met
- a better understanding of what to expect
- enhanced visitor experience
- improved visitor safety

For the heritage place and its managers:

- protection of fragile resources
- minimal impact through education about a particular issue
- minimal impact through increasing visitor awareness of appropriate behaviour
- decreased need for enforcement/rescue through increasing visitor awareness of appropriate behaviour
- increased community understanding and support for management decisions
- greater community ownership of the heritage place and involvement in conservation activities
- increased funding (where user charges apply for interpretation)
- more sympathetic management of neighbouring properties

For the Department and the wider community:

- environmentally aware citizens who value Queensland's natural and cultural heritage

[Source
QDEH Draft Public Contacts Manual. August. 1998]

Best Practice Example 3

Involving the Community

Some agencies actively seek community and stakeholder input during the defining stage to be better able to determine community values, interest and needs for interpretation and education services.

Some major benefits of working with stakeholders and the community are:

- Increased quality of decisions – by providing further sources of expertise and information and identifying different perceptions.
- Improved credibility.
- Focus the planning on issues of community concern.
- Increased productivity through reduction in frequency of acute adversarial situations.
- Increased ease of implementation – through higher levels of commitment to a decision by interest groups with a stake in the decision.
- Increased awareness and understanding of the agency's business.
- Meeting corporate obligations/requirements for public consultation.

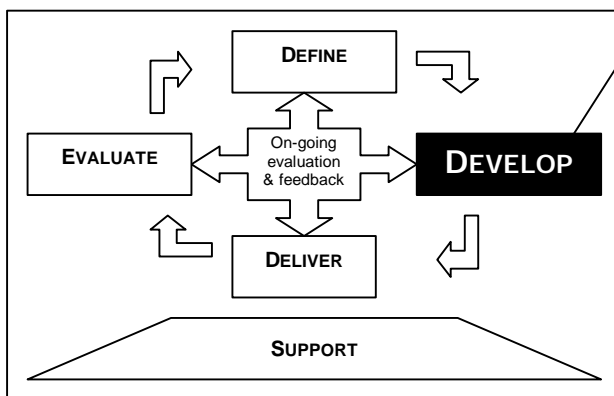
Source: *Adapted from Community Communication Programs – A Seven Step Guide.*
Melbourne Water, May 1994.

They contend that these objectives are listed in priority order from the visitor's perspective of importance, but that many heritage managers currently practise them in the opposite order.

3.5 DEVELOPING

This section explores the scope and nature of planning that needs to occur in organisations when dealing with interpretation and education services and programs.

- Are all the relevant corporate goals and functions addressed?
- Are key audiences being targeted with key messages?
- What levels of service should be provided?
- Are appropriate objectives and performance standards defined, along with Key Performance Indicators and a suitable measurement system?



A Model for Park Interpretation and Education Services

This stage includes:

- Establishing objectives
- Mapping and analysing customer needs
- Formulating and refining messages
- Setting Performance Standards
- Setting Key Performance Indicators
- Identifying key secondary customers
- Weighing costs against benefits
- Designing appropriate methods and options for service delivery
- Specifying relationships with other products or services

In the DEVELOPING stage of the business cycle, the defining elements identified in the DEFINING Stage are translated into strategic planning for interpretation and education services.

In many organisations, much of the interpretation and education planning appears to derive from the sites where the delivery occurs, rather than from corporate goals identified previously. Planning needs to consider the specific site requirements, but should be driven by corporate goals to ensure that the programs delivered are focussed on the desired corporate outcomes.

The outcomes from the DEVELOPING stage must be clearly and systematically communicated to the key staff involved in the DELIVERY and EVALUATING stages. Failure to do this results in a loss of focus in terms of delivering interpretation and education services that address corporate goals and Critical Success Factors.

BEST PRACTICE

Best practice in the DEVELOPING stage of interpretation and education is:

- ⊙ Using interpretation and education strategically. Define key results in terms of corporate goals, set clear objectives and indicate how each will be evaluated. (See Best Practice Example 4 and 5.)
- ⊙ Having a comprehensive procedure for identifying programs, messages, target audiences and approaches to be used.
- ⊙ Using market/community research to identify and better understand their audiences and customers. (See Best Practice Example 7.)
- ⊙ Defining the Critical Success Factors.
- ⊙ Defining suitable Key Performance Standards.
- ⊙ Defining Key Performance Indicators.

Refer also to Checklist for Best Practice: Developing, in Appendix 4.

3.5.1 KEY FINDINGS

Key findings from the survey and literature review are that:

Plans are not always related to corporate goals

The literature review noted that many management agencies in Australia and overseas are now producing strategic documents focussing on interpretation and visitor services. This contrasts notably with the situation a decade ago when little interpretation and education planning was documented.

Many respondents (70%) reported having a documented interpretation and education strategy or plan. Most survey respondents (90%) reported their organisation prepares project or program plans for specific interpretation and education projects, identifying the resources needed, timeframes, methods and/or personnel.

However these plans do not always clearly relate to key corporate objectives. Key results need to be established and should be stated in terms of corporate goals.

Key Performance Indicators (ways of measuring that the objective has been met) should also be identified.

Best Practice Example 4

Linking Interpretation to Corporate Goals

CALM's Recreation and Tourism Strategy 1996-2000 translates its Mission into objectives for 13 Focus Areas, including:

Focus 3: Customer Satisfaction

Focus 4: Enriching Visitor Experience

Within each Focus Area the Strategy lists ways these will be achieved and ways they can be measured.

For example:

Focus 4: Enriching Visitor Experience

- Promoting and conducting interpretive activities programs in major recreation areas with significant visitor numbers and where a demonstrated desire for such programs exist.

The strategy also identified ways of measuring whether the target has been achieved (Key Performance Indicators).

[Source: Recreation and Tourism Strategy 1996-2000 Department Conservation and Land Management, Western Australia]

Best Practice Example 5

A Program to Deliver Corporate Goals

National Parks and Wildlife Service New South Wales considers National Parks *Discovery – Walks, Talks and Tours* one of the most important community education programs undertaken by the Service. *Discovery* represents front line delivery of our legislative responsibilities for community education under the *National Parks and Wildlife Act 1974*, the *Wilderness Act 1987* and the *Threatened Species Conservation Act 1995*. *Discovery* also provides a mechanism for two-way communication with the community about our natural and cultural heritage and corporate priority issues relating to our legislative roles and responsibilities

The *Discovery* Program:

- provides the public with the opportunity to experience and learn about natural and cultural heritage 'on the ground'
- provides a mechanism for communicating key corporate messages about natural and cultural issues to the community through educational themes. The *Discovery* Program follows themes based on corporate priority areas and develops supporting resources for use in developing key messages that establish consistency in organisational communication in these thematic areas.

[Source: *Discovery – Walks, Talks and Tours* Annual Report September 1997]

►►►► **Planning is not always comprehensive and systematic**

None of the survey respondents reported having a documented procedure for deciding which interpretation and education materials and programs to provide, which audiences to target, which approach(es)/methods to use (e.g. publication, sign, face-to-face) and who will deliver these services.

Respondents use a variety of tools and processes for deciding the above:

- formal visitor or market research (73%)
- informal visitor or market research (50%)
- as part of departmental planning process such as budgeting (68%)
- their organisation's communications or interpretation and education plan(s) (46%)
- informal process by the group responsible for interpretation and education (46%)
- mainly in response to Minister's/senior managers' directives (14%)

Of the organisations that target key messages to specific audiences, 79% indicated they have a documented process for this. It is not clear from the questionnaire whether the process used relate corporate goals of the agency to particular target audiences.

A review of the documents obtained during the survey indicates that organisations do not usually have a systematic way of identifying key audiences and targeting corporate messages to them.

The approach or methodology for delivering the messages to the selected audiences should be developed in the Planning Stage.

►►►► **Objectives are not always clear**

While most organisations surveyed (82%) reported defining objectives for their interpretation and education services, a review of documents provided by a variety of agencies indicates that these objectives are often vague and unmeasurable. SMART objectives should be set for environmental and heritage appreciation and management and for customer satisfaction.

Best Practice Example 6

Set SMART objectives

Set SMART objectives where possible and indicate how each will be measured and evaluated.

SMART Objectives are:

- S**pecific
- M**easurable
- A**ction orientated
- R**ealistic
- T**ime focussed

►►►► **Suitable performance standards and associated monitoring systems are not always in place**

Many of the organisations surveyed (67%) define performance standards for their interpretation and education services. The performance standards are usually set by senior managers, interpretation and education staff, or occasionally by both.

Survey responses indicate that most organisations (73%) set Key Performance Indicators (KPI). Several commented that their KPIs are very broad. However it is not clear whether the KPIs currently set by organisations clearly measure whether objectives have been achieved, nor whether the standards that have been set are the critical ones for successfully operating interpretation and education services in terms of achieving corporate goals.

Key Performance Indicators and measuring systems should be determined at the Planning Stage. KPIs can be broad (such as the increase in community awareness of the purpose of parks measured by survey) or more specific and tangible (such as the proportion of licensed tour operators achieving training or accreditation in interpretation and educational quality; or the reduction in the volume of rubbish left in a park). Given the different contexts that agencies work in, this project cannot develop generic Key Performance Indicators for interpretation and education.

►►►► The nature and needs of audiences are beginning to be better understood

Survey respondents ranked their most important audiences as:

1. First time visitors
2. Schools
3. Repeat Visitors

It is not clear whether these are their most frequent audiences.

Less than half (48%) of the organisations surveyed reported having a formal process to decide which particular audience groups to target.

Market research instruments ensure better understanding of primary customers/audiences and their needs and interests.

The literature review revealed that agencies in Australia and overseas are increasingly using visitor surveys and other instruments for learning about their audiences. The survey found that market segment categories (e.g. Quantum-Harris, Roy Morgan) are used by some agencies in Australia to better understand different audience interests and requirements.

Setting up a comprehensive monitoring program can be time consuming and expensive. However, obtaining information about visitors could also be achieved by utilising existing visitor research systems run by, for example, tourism agencies, or the Australian Bureau of Statistics.

These tools are helpful in identifying key target audiences to be reached (as opposed to 'the general public') and in determining which key messages to address to each of the identified audiences.

There appears to be little systematic assessment made of the needs of secondary customers or indeed of identifying who the organisation's key secondary customers are (see Appendix 3 for clarification about Primary and Secondary Customers).

►►►► Messages are beginning to be better targeted

Many organisations (83%) identify key messages for their interpretation and education services and many of these target key messages to specific audiences (74%).

It is important that the key messages are the ones that are critical to achieving corporate success, i.e. in achieving what has been determined at the Defining Stage.

Best Practice Example 7

Visitor Monitoring Program

Parks Victoria conduct systematic and extensive surveys to monitor:

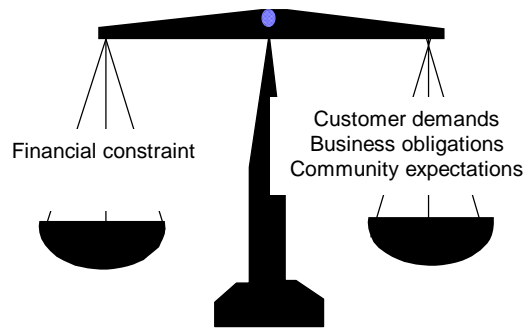
- visitor numbers
- customer satisfaction
- community perception.

Parks Victoria now has an established database of many thousands of visitor responses against which to compare visitor numbers and satisfaction results from year to year and between parks. This database includes some questions dealing with visitor satisfaction with educational opportunities and services. The results of these surveys are distributed to park staff.

3.5.2 LEVELS OF SERVICE

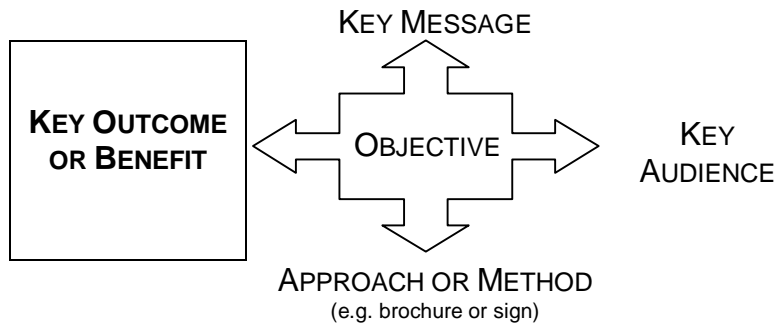
By 'levels of service' is meant whether an agency provides intensive services such as face-to-face interpretation at a site, moderate services or no service.

The level(s) of service provided by any business should be determined by analysing 'business drivers' including customer demands, business obligations (e.g. legislation, regulation, risk management) and community expectations; and balancing these with financial constraints. Ultimately, the level of service provided must be one that is acceptable and affordable by both the agency and the customer.



An important element in establishing a basic level of service for interpretation and education services involves identifying key outcomes or benefits in terms of corporate goals/objectives. (The key outcomes for interpretation and education are derived from the Critical Success Factors -see Appendix 3). The key outcomes are then matched with key messages for specific audiences and the most effective and efficient delivery mechanisms then selected. The clearer the objective, the easier it will be to select the basic level of service required to achieve it (i.e. key message ⇔ key audience ⇔ most effective/efficient approach).

1. The key outcome or benefit drives what the objective will be.
2. Then the best approach to deliver the key message to the target audience can be decided.



Another important element in determining the level of service provided is the performance standard required. 'Cheap' products and services are likely to be unacceptable to the government or private owners, the community, the customers or all of these. Whatever the level of service provided, performance standards and measures are needed to ensure that the activities can be assessed in a meaningful way (see Section 3.7: Evaluation).

Survey responses to the question 'Who is involved in deciding what types and levels of service an organisation will offer?' revealed it is mainly interpretation and education staff (83%) and senior managers (83%). Others who are less frequently involved in this decision are stakeholders (44%), visitors (39%) and the community (9%).

Some agencies have a strategy of focussing the delivery of Interpretation to their major parks/sites rather than all of them (e.g. CALM). While the investigation found examples of defining levels of service for interpretation and education services (see Best Practice example 8) it did not reveal a clear *procedure* for developing this important aspect of interpretation and education service management.

Best Practice Example 8

Defining Levels of Service (operational level)

QDEH provides a list of minimum interpretive activity levels for off-peak season and peak season for different categories of parks. For example:

Category A Parks

- Annual visitation over 80,000
- Minimum two park staff
- Campground and/or resort in or near park

Minimum interpretive activity levels:

Off-peak season:
activities to be considered if more than 15 camps (approximately 40 people), or at least 25 resort guests, or requested by an organised group.

Activity level:
Two different activities per week

Peak season:
Five activities per week

[Source: Division of Conservation
Queensland Department of Environment and Heritage
Policies and Guidelines for Interpretation and Public Contact.
June 1994.]

DEVELOPING

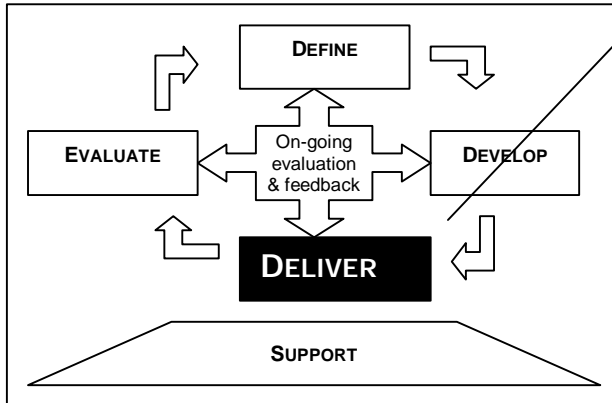
It is recommended that criteria be developed for agencies to use to determine basic levels of service while ensuring that key messages are delivered to key audiences in the most effective and efficient manner.

See also 3.6.2 for a discussion on outsourcing and charging for service.

3.6 DELIVERING

This section investigates what interpretation and education services and products are being offered by organisations and who delivers them.

- Are roles and responsibilities defined?
- Are there differences in the services delivered by staff or external organisations?



A Model for Park Interpretation and Education

The DELIVERY Stage is concerned with the day-to-day delivery of interpretation and education services. This involves controlling delivery at the organisational management level and by field professionals to ensure services are in accordance with environmental, heritage and customer target objectives, delivery timelines, budget and preset service design features. Work routines and job responsibilities need to enable operational managers and field practitioners to balance a range of variables to ensure effective delivery of interpretation and education services. These variables include policy, technical, scientific, educational, unit cost, customer monitoring, organisational reporting and policy requirements.

The delivery needs to be clearly directed by the Plans and Standards from the previous stage if the focus is to remain on corporate goals.

Although evaluation of outcomes will be undertaken in the following stage it is important that regular monitoring and reporting of effectiveness and efficiency of delivery be carried out.

Communication, especially to secondary customers (e.g. other agency staff, providers) needs to be a regular feature of this stage. See Appendix 3 for information about Primary and Secondary customers.

Key features of this stage include:

- Controlling delivery to ensure services are in accordance with target objectives, timelines, budget and standards
- Seeking feedback to monitor the effectiveness of services and improve day-to-day performance
- Communicating internally across the agency's operating units and externally with the agency's customer base to support effective delivery
- Designing work routines and job responsibilities for effective delivery of interpretation and education services.

DELIVERING

BEST PRACTICE

Best practice in the DELIVERING stage of interpretation and education is:

- ⊙ Clearly defining roles and responsibilities for all stages of interpretation and education services across the organisation and capturing these in staff performance plans.
- ⊙ Having identified and understood service standards/levels that ensure quality and are driven by Corporate goals.
- ⊙ Having well defined Key Performance Indicators. (See Best Practice Examples 9 & 10 for external suppliers.)
- ⊙ Ensuring all key staff and external suppliers understand the agency's policies and objectives for interpretation and education services and participate in the corporate planning cycle. (See Best Practice Example 11.)
- ⊙ Having clear communication links between all levels, including external suppliers.

Refer also to Checklist for Best Practice: Delivering, in Appendix 4.

3.6.1 KEY FINDINGS

The survey found that organisations deliver their interpretation and education services in a range of ways. (For information on staffing and budget see also Section 3.2: Organisational Profiles.)

»»»» Staff allocations

The scope of this project was to gather information about interpretation and education services on an organisation-wide basis for the 27 organisations that took part in the survey. As part of this survey it was found that:

Organisations allocate their staff in varying combinations of ways including:

- separate staff for interpretation and education
- combining both roles in one
- allocating a proportion of a staff member's time (e.g. 20% of ranger's time) to interpretation duties

The varied profiles and responsibilities of the organisations make detailed quantitative comparisons impractical. However the following data indicates the range of staffing practices.

For most of the organisations surveyed, it appears to be mainly staff who deliver the interpretation and education services. The following shows the number of organisations that ticked each percentage range.

Interpretation:

On-site face-to face interpretation services are physically delivered by:

	100%	99% - 60%	59% - 30%	29% - 1%
Staff (permanent)	5	10	0	4
Seasonal staff	3	0	0	3
Outsourced Contractors	0	1	4	3
Volunteers	0	0	1	7

On-site passive interpretation services (e.g. signs, publications) are written by:

	100%	99% - 60%	59% - 30%	29% - 1%
• Staff (permanent)	9	5	4	2
• Outsourced Contractors	1	1	5	3
• Volunteers	0	0	0	3
• Seasonal staff	0	0	0	1

Education

On-site face-to-face education services are physically delivered by:

	100%	99% - 60%	59% - 30%	29% - 1%
• Staff (permanent)	6	7	2	0
• Outsourced Contractors	0	0	0	2
• Volunteers	0	0	1	4
• Seasonal staff	2	1	3	0

On-site self-guided education services (e.g. self-guided materials) are written by:

	100%	99% - 60%	59% - 30%	29% - 1%
• Staff (permanent)	8	1	0	2
• Outsourced Contractors	0	0	1	8
• Volunteers	0	0	0	2
• Seasonal staff	3	0	0	1

It was outside of the scope of this project to assess whether roles and responsibilities for interpretation and education were clearly defined. However analysis of other results from the survey suggest that responsibilities for establishing, implementing, monitoring and reporting on these services are not always integrated across the organisation. These roles and responsibilities should be clear in the reporting system that is accountable for each of these components and should be captured in Staff Performance Plans.

►►►► **Products and services**

• **On-site interpretive services**

The most common products and services appear to be interpretive signs and guided walks/drives but survey respondents also listed many other techniques.

• **Off-site interpretive services**

Services offered are mainly via brochures and the internet but a diverse range of other techniques were also listed by survey respondents (see Educational activities and materials below).

• **Educational activities and materials**

Apart from education programs and materials for school groups and teachers, organisations also listed activities for audiences other than normal school groups including: mobile exhibitions/trailers, magazines, Bush Ranger Program and manual, Junior Ranger activities and materials, tour guide training, a TV show, an urban wildlife service.

Number of organisations that rated it as a High Priority

Interpretation signs:	13
Guided Walks/Drives/Dives/Tours:	11
School group activities:	9
Visitor Centre:	8
Self-guided Walk/Drive publications	6
Theatre performances:	6
Talks by I/E personnel:	6
Children's activity sessions:	6
Spotlight/Night Walks:	4

Number of organisations that rated it as a High Priority

Pre-visit

Interpretation brochures/leaflets:	15
Internet site:	8
Broadcast media:	3
Video:	1

Post-visit

Internet site:	5
Books:	2
Interpretive brochures/leaflet about park(s):	1

►►►► **Key corporate information is not always communicated**

Site managers and planners do not always have a clear understanding of the benefits of interpretation and education. Parks Canada commented that often in the past, Corporate policy documents were not readily accessible to staff. One of the most important steps they have taken for improving delivery of corporate goals is to provide interpretation staff with copies of the key Corporate documents.

Best Practice Example 9

Communicating Corporate Goals and Strategies across the Organisation

Environment ACT has a simple and effective method of disseminating the organisation's communications strategies. Its 1998 Communications Strategy Summary broadsheet lists (on one A3 sheet) the Vision, Mission, Communication Goals, Key Messages and communication tasks for 'Educating and Informing the Public'.

DELIVERING

All staff should understand corporate policies, objectives, targets and programs. All personnel delivering interpretation and education programs and products need to be aware of all relevant performance standards. Staff need to be updated quickly following any changes to corporate targets. New staff need to be provided with adequate support and training.

►►►► **Occupational Standards and Accreditation systems are increasingly being used**

There is a trend towards setting standards for interpretation professionals. The US National Association for Interpretation has recently introduced a multi-level Certification Program for their members. Parks Canada has produced Heritage Presentation Standards and Canada's Ontario Tourism Education Corporation has produced National Occupational Standards for Heritage Presenters. In Australia, the Ecotourism Association of Australia and Royal Melbourne Institute of Technology University are currently developing the National Ecotour Guide Certification Program. Of the organisations surveyed, only 4 have accreditation standards for their staff, contractors or volunteers, although some are working towards them. In some agencies licensing of ecotourism operators has no accreditation requirements. While agencies may wish to develop their own programs for specialised ecosystems or competencies specific to their own regions, it is highly desirable that where possible ANZECC agencies utilise the generic industry schemes to provide portability and recognition across the nation and to reduce the costs of administering schemes and the costs to practitioners in gaining qualifications.

►►►► **Activities are being assessed by field staff**

On-going evaluation of park interpretation and education programs is often conducted by questionnaires handed out by staff or volunteers at the end of an activity, or more frequently by informal anecdotal assessment by interpretation and education staff. These questionnaires usually focus on demographics and broad visitor satisfaction e.g. "Did you enjoy this activity?" As part of their professionalism, interpretation and education staff typically and regularly improve their activities in response to formal and informal visitor feedback.

3.6.2 OUTSOURCING

This is an area where, regardless of corporate philosophy or legislative requirements, best practice depends on good process.

- Best practice in outsourcing entails being clear about the objectives sought (e.g. reduced costs, improved quality, greater choice, better performance through competition, or better focus on the services retained in-house).
- The processes for recruiting, managing and evaluating in-house staff need to be able to be replicated and modified for outsourced delivery (e.g. both in-house and outsourcing personnel need good processes to for dealing with expressions of interest, contract management, accreditation etc.)
- There needs to be a realistic assessment of whether these objectives can actually be achieved:
 - Is there a sustainable marketplace of providers?
 - Private providers may be more efficient through lower overheads but in-house staff already on-site for other functions may be a more efficient option
 - 'outsourcing' is not 'offloading' – virtually all of the elements of the model (except delivery) remain the responsibility of the agency.

Philosophy

There are clear differences in philosophy among agencies in regard to what services should be outsourced. Some have government directives to outsource. Others consider it critical that staff are the ones that deliver core messages and see it as part of their relationship building with the community. It is seen as a critical way to maintain control over quality and that contractors cannot be expected to deliver corporate messages.

The survey found that the main types of services agencies outsource are (in order of frequency):

- Face to face interpretation programs
- Graphic design
- Writing, design & production of interpretation signs, publications & displays
- Education program development
- Visitor Centre staffing
- Theatrical performances

Alternative models of delivery

In response to diminishing budgets and staff, Australian and international agencies are adopting privatisation and contracting models as alternative methods of delivery of interpretation services and products. A number of management agencies are gradually relying on commercial tour operators, coach drivers etc to deliver interpretation to their clients. This has aroused some concerns among stakeholders and in the literature regarding quality and commitment.

Some outsourcing has occurred as partnerships, for example:

- Education Department supplies funds or staff to a park agency for provision of education services to schools
- Park agencies supply funds to community groups for Landcare and Land for Wildlife interpretation or educational activities

Volunteers are also being increasingly used, especially in leading or assisting with guided walks/activities/talks.

Setting and measuring standards

Whether services or products are delivered by staff or are outsourced, clear standards for delivery of interpretation and education services need to be set, along with measurable Key Performance Indicators. (See 3.7.1: Evaluating Interpretation.)

Performance based service contracts for external providers should relate to these Key Performance Indicators.

Best Practice Example 10

Key Performance Indicators for outsourced delivery

A *Customer Services Standards Manual for Commercial Tour Operators* is being developed by Parks Victoria. The Manual identifies 3 areas:

- Service intangibles (Reliability; Assurance; Responsiveness; Empathy)
- Environment Responsibility (Waste Minimisation; Littering; Pollution; Minimal Impact)
- Service tangibles (Physical facilities; Signage; Staff Presentation and appearance; Merchandising)

The Manual outlines a full range of Key Performance Indicators (KPIs) for Parks Victoria and operators to select from. This comprehensive listing provides flexibility for operators and Parks Victoria to negotiate a 'custom-made' combination of KPIs that meet the needs of each specific operation. It also provides assistance in identifying who is responsible for each KPI and establishing an agreed timeframe.

3.6.2 OUTSOURCING (CONTINUED)

Practical problems

Some practical problems have been identified by some agencies that have outsourced Interpretation services, including:

- having interpretive contractors with viable businesses and enough working capital to be sustainable (both Parks Victoria and Brisbane City Council have experienced these difficulties)
- adjusting training programs to meet the needs of small businesses (see 3.8: Supporting).

How do you decide when to outsource?

Most of the organisations surveyed decided this on the basis of whether:

- staff expertise was not available in-house within timelines, and
- they had the funds to pay the contractor

Their first preference was usually to do it in-house.

Agencies should develop criteria to decide if and when to outsource interpretation and education service delivery. Cost benefit analysis, assessment of effectiveness and establishment of standards and monitoring systems should also be developed in association with outsourcing services.

The Ranger factor

Another consideration in connection with the outsourcing of some public contact services for parks is the perception of visitors/customers. The Department of Conservation in New Zealand has outsourced interpretive services for some years. Its comment was that anecdotal evidence is indicating their park visitors want to have more contact with park rangers.

A useful further investigation would be whether visitors/customers perceive messages differently when delivered by park staff compared to outsourced staff. A key factor in this consideration is whether the outsourced provider is distinguishable from park staff since in some cases outsourced providers wear a similar uniform to park staff.

Charging for services

A criteria used by several agencies (e.g. Parks Canada, NSWNPWS, QDEH) is that core or corporate message should be provided for free. QDEH uses the criterion that there must be a free alternative for each users-pays interpretation product so as to not discriminate between those who can't or don't want to pay and those who are willing to pay. NSWNPWS actively charges a small fee for face-to-face services because of the perception that free services are not as valued.

In one case it was reported that a restructure of the agency led to intense pressure to charge for everything. This forced interpretation and education staff to focus on providing activities/materials that could be charged for and for which there was likely to be a willing paying audience. As a consequence these activities were often not related to the agency's mandate or limited to achieving financial goals.

It is recommended that criteria should be developed so agencies can decide which services are free and which are charged while ensuring that key messages are delivered to target audiences.

Best Practice Example 11 **Facilitating Outsourced Delivery**

Brisbane City Council is investigating sponsoring a central booking system as one way of facilitating the development of the small business sector for the mutual benefit of the agencies and the contractors. They have found that their interpretation (and recreation) contractors do not have the finances, skills or interest in this area. Interpretation contractors are not likely to find full time work with any one agency and so are more likely to provide their services on a part-time or seasonal basis and offer to work with several agencies. A central booking agency would allow these contractors to focus on program delivery.

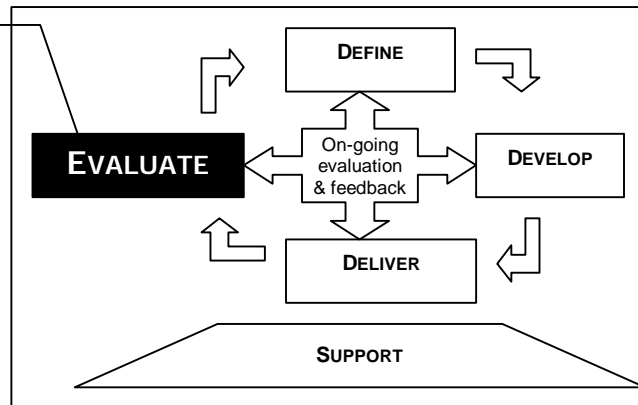
3.7 EVALUATING

This section investigates how organisations monitor, measure, evaluate and improve their interpretation and education services.

- What contribution do these services make towards achieving corporate goals?
- Are procedures in place for improving these services in terms of effectiveness, efficiency, accuracy and consistency?

This stage checks that the products and services that the agency has chosen to deliver are regularly and systematically assessed for:

- Effectiveness in achieving their stated customer, environment and heritage outcomes
- Degree to which Key Performance Standards are being met
- Level to which Key Performance Indicators have been achieved
- Continuing relevance of their objectives and design features
- Wider anticipated or unanticipated impacts
- Value for money



A Model for Park Interpretation and Education

BEST PRACTICE

Best practice in the EVALUATING stage of interpretation and education is:

- ⊙ An evaluating process for interpretation and education services that addresses all components of the evaluation cycle, with clear links to Key Performance Standards that address corporate goals and targets.
- ⊙ Clearly defined and measurable Key Performance Indicators which can be used to check that the standards and key corporate objectives have been met.
- ⊙ Integrating evaluation of interpretation and education services into the organisation's customer/visitor satisfaction surveys. (See Best Practice Example 12).
- ⊙ Linking evaluation to performance assessment of deliverers (in-house and outsourced). (See Best Practice Example 15).
- ⊙ Involving all key staff they are aware of the outcomes from evaluation.

Refer also to Checklist for Best Practice: Evaluating, in Appendix 4.

EVALUATING

The continuous feedback and monitoring processes of the delivery stage helps ensure that the EVALUATING Stage occurs in harmony with day-to-day field delivery. Observations and conclusions emerging from the evaluation stage inform the agency about the extent to which objectives have been met, the feasibility of those objectives and the appropriateness of service design. This feedback will tell the agency whether major corrective changes are required of service delivery, including whether the current programming should be changed to new forms of service activity. Monitoring systems should be identified in the Developing Stage. Public service enterprises often have a mandate to incorporate public involvement and a 'sense of ownership' in the management and care of their sites. This requires feedback from visitors and stakeholders.

Evaluation stage and on-going evaluation

The model illustrates that there is a distinct Evaluation stage as well as on-going evaluation processes that occur at and between all stages. Evaluation is a cycle of processes; it is not just an activity conducted after a product has been delivered to a customer.

Benchmarking and Best Practice

Benchmarking is the process of identifying, describing and measuring best practice. It is a function of the evaluation stage of the business cycle.

3.7.1 THE EVALUATION CYCLE

Levels of Evaluation

Interpretation and education services and products need to be evaluated at several different levels:

- Visitors/customers satisfied with the quality and level of service
- Relevance to Corporate goals
- Efficiency in terms of achieving specified targets and objectives (usually measured in terms of costs)
- Effectiveness in terms of achieving specified targets and objectives (how well they are achieved)

The evaluation process involves several interrelated steps, developed at the Planning Stage, including:

- Setting a **Key Performance Standard** for a key service/product
(e.g. all signs will be of constructed from a material that will last at least 5 years)
- Determining a performance measure – a method of measuring via a systematic monitoring program or technique
(e.g. a monitoring program based on visitors completing a questionnaire at the end of an interpretive activity)
- Determining a **Key Performance Indicator(s)** that relates to the measuring technique
(e.g. that 85% of participants rate the interpretive activity as highly enjoyable)

A Key Performance Standard does not need to be set for every activity but every interpretation activity that is to be evaluated should have identified and measurable objectives to measure.

Key Performance Standards for interpretation are currently not very 'formal' as they are not as simple to determine and measure as, for example, Performance Standards for a motor engine. It is recommended that more formal Key Performance Standards (KPIs) for interpretation be developed so that they can be better articulated. This will be especially useful if the delivery is outsourced and Key Performance Standards need to be communicated to contractors.

Only evaluate Critical Success Factors

Key Performance Indicators are the criteria and tools used to measure or assess how well Critical Success Factors (CSFs) have been achieved. (See Section 3.3.2: Example and Appendix 3 has further information on KPIs and CSFs). Evaluation can be time consuming and costly so it is important that evaluation efforts concentrate on these CSFs – it is of little value to evaluate factors that are not critical to the organisation.

* * *

The lack of an overall system for conducting systematic evaluation as part of the whole cycle of interpretation program development is a major limitation for many organisations. For example, if Key Performance Standards have not been defined, it is difficult to determine what should be measured. Also, if the Key Performance Standards and KPIs are not clearly related to the delivery of corporate objectives, then evaluation does not measure what contributions interpretation is making to the main areas of interest to the organisation.

The general consensus from the survey participants and the literature review is that this area still has a long way to go. Budgets are limited, staff generally receive little training in evaluation techniques and relevant tools are often not available. Knowledge, one of the gains attributed to Interpretation, is expensive and difficult to gauge, as are many of the other outcomes interpreters and educators would like to measure. More importantly, the setting of standards, performance measures and indicators are often not addressed adequately at the planning stage to make evaluation as useful as it could be.

A central challenge for most park agencies in interpretation evaluation is cost effectiveness. Interpretation programs generally have very limited resources, are geographically dispersed and provided irregularly. The costs of conventional evaluation techniques such as customer surveys or audits are often impractical. An alternative is to have generic evaluation of interpretation, e.g. an interpretation satisfaction survey for customers across a state-wide or region-wide sample, or to include generic questions in an existing survey program of visitors.

Best Practice Example 12

Customer Satisfaction Monitor

Parks Victoria has an established visitor research program. Its Customer Satisfaction Monitoring Program measures visitor satisfaction with its parks, the facilities and services available or delivered in its parks.

The questionnaire has a generic section which includes the category Learning Information (signs, displays at visitor centres, rangers talks about special features, plants and animals in the park). A customised section of the questionnaire seeks feedback on specific interpretation elements in that park (e.g. the Visitor Centre).

3.7.2 KEY FINDINGS

►►►► Few organisations have a comprehensive evaluation process in place

Few of the organisations surveyed appear to have an effective evaluation program in place for their interpretation and education services and products. Most appear to address only some components of the overall evaluation cycle. Museums appear to be leading the way in incorporating evaluation into their program development and delivery.

Evaluation of education services for school audiences is more common practice mainly because the formal education system requires it and has systems in place to evaluate learning in relation to curriculum requirements. These are typically conducted by the teacher in charge of the school group.

Most existing formal monitoring and evaluation in parks relates to visitor demographics and other areas of visitor satisfaction with facilities rather than satisfaction with specific interpretation and education services. CALM and Parks Victoria include some questions relating to interpretation in their visitor monitoring surveys. Some organisations rely mainly on visitor feedback forms handed out at the end of an interpretation or education activity. These questionnaires also occasionally probe visitor understanding of key messages.

Visitor research

The survey found that visitor research varies considerably from systematic and formal survey procedures to ad hoc, or as needed, surveys or informal anecdotal assessment by staff.

- **Assessing Performance**
63% use formal visitor surveys to assess whether performance levels/standards have been reached.
- **Targeting programs**
43% conduct annual visitor and/or market research while the remainder conduct research at highly variable frequencies (from 'constantly' to 'every 5 years') to target their services and products.
- **Visitors' use of a site**
52% conduct annual research, 19% conduct research every 3-5 years while others use varying schedules.
- **Visitor satisfaction**
57% conduct annual research.
- **Non-visitors**
44% conduct no research, 31% conduct annual research (out of 16 organisations).

Monitoring supplies and condition

Out of 17 organisations, 29% do not regularly and formally track the supply and condition of their non-personal interpretation (displays, publications, signs etc). Others often use informal, non-systematic methods. CALM's monitoring system for checking its assets includes assessment of interpretive structures.

Budgets

Many organisations do not set specific budgets for monitoring and evaluation; several noted it was mainly included within their staff's normal salary award; half allocate less than 5% of their interpretation and education operations budget. Several rely on ad hoc research opportunities with universities.

►►►► Evaluation results are rarely published

Although the concepts of benchmarking and best practice are receiving popular support in interpretation and education, there is little research published on their application to interpretation. Publication of the results of interpretation evaluation programs is rare.

Best Practice Example 13

Evaluation Policy and Guidelines

The Museum of Australia has a comprehensive Evaluation Policy and Guidelines document for evaluation of their Interpretation and Education programs. They have staff dedicated to these tasks and incorporate evaluation as a regular part of their visitor programs (e.g. using front end, formative, summative and remedial evaluation).

Systematic and formal monitoring procedures currently being used include:

- surveys conducted by an agency's own staff (e.g. CALM's VisSTATs procedures and manuals).
- surveys using an outsourced provider (e.g. Parks Victoria's Customer Satisfaction Monitor)
- tapping into the formal survey systems used by their State/Territory tourism agency (e.g. PWCNT)

While current survey systems may help organisations assess whether some corporate outcomes/targets are being reached (e.g. numbers of visitors, visitor enjoyment) most do not assess to what degree key interpretive messages have been understood.

»»»» **Key Performance Indicators are not always related to Critical Success Factors**

Survey responses indicate that 73% of organisations set Performance Indicators however it is not clear whether these are useful measurements linked to corporate goals. Several commented that their KPIs were very broad.

Best Practice Example 14
Performance Indicators that Measure Objectives

Tidbinbilla Nature Reserve Interpretation Strategy lists several objectives for interpretation relating to the Reserve, for example:

- Influencing visitor behaviour to minimise visitor impact on the environment and other people, and maximise enjoyment

The strategy lists a Performance Indicator, optimal range for indicators, and research to evaluate each objective, for example:

PI = average weekly number of incidents that visitors are observed feeding wildlife. Optimal range = 0-2. Research technique: monitoring via observations at picnic sites during lunch periods on different days and months.

[Source: Tidbinbilla Nature Reserve Interpretation Strategy. Environment ACT 1998.]

»»»» **Assessment of consistency and accuracy is mostly informal and is not documented**

Most of the organisations surveyed have no documented procedure for assessing:

- consistency with organisation's Policies
- scientific accuracy
- cultural accuracy

These are typically assessed informally via a referral process to in-house or external experts.

»»»» **Effectiveness is not often assessed**

Effectiveness relates to evaluation of how well the program/activities achieve corporate goals.

No organisation reported having a process in place to assess long term effectiveness. Four survey respondents have a process for assessing the short-term effectiveness of their interpretation services.

- The Australian Museum has just begun to assess the long-term effectiveness of specific projects by using focus groups held six months after a visit to a specific exhibition program. They also produce evaluation reports for each program/service that includes some assessment of its effectiveness.
- GBRMPA conducted a study to assess the effectiveness of symbols used on signs to convey messages.
- GBRMPA is developing a Community Attitudes survey to establish a baseline against which it can measure changes in attitudes.
- Brisbane Forest Park is developing techniques to evaluate messages conveyed to children by assessing stories, poems and artwork produced following visits to the park

Best Practice Example 15

Evaluation Tool

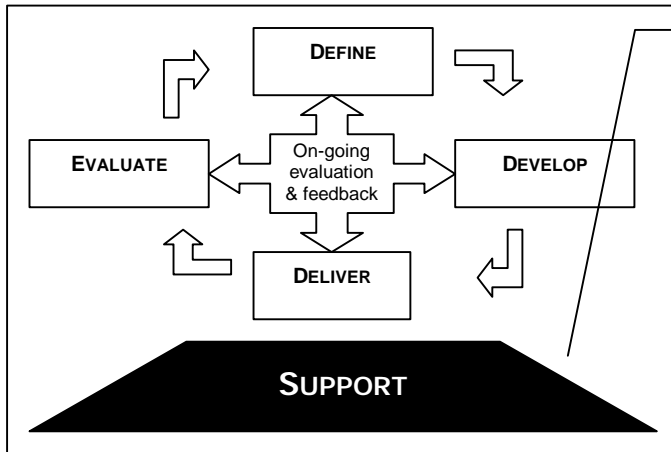
British Columbia Provincial Parks are currently piloting an Interpretive Program Evaluation Tool for their Guided Walks and Evening Programs. This checklist is designed to help front line interpreters assess if they have been effective and to help managers know if their interpreters and the interpretive methods used are effective. The tool evaluates program design and interpreters performance by addressing Audience Analysis, Goals and Objectives, Messages, Site Selection, meeting Agency standards, Technical Aspects, Presentation, Effectiveness of Program and Presenter.

For more information contact
Richard Kool, Interpretation/Education Program Officer
British Columbia Parks
Email: rkool@cln.etc.ba.ca

3.8 SUPPORTING

This section investigates how organisations provide support to their Interpretation and Education Services.

- Are staff training needs being identified and met?
 - Are support materials available?
 - Are procedures and reporting systems in place?



A Model for Park Interpretation and Education

This stage represents those organisational inputs that must supplement or be added to the other business cycle stages.

The interpretation and education support functions mainly address responsibilities such as:

- Human resources, skills and deployment
- Financial systems
- Technology, equipment, and supply of materials.

The SUPPORT Stage of the interpretation and education services business cycle represents those organisational inputs that must supplement or be added to the other business cycle stages so that those stages can be assured of operating with optimal effectiveness.

The support stage also ensures that information systems are in place in the agency to support communication, evaluation, data analysis and performance reporting.

New interpretation staff and new service providers to the agency need to be appropriately inducted and orientated regarding the agency's corporate interpretation and education policies. Existing staff need to be kept up-to-date and receive additional training in the skills and knowledge required to successfully undertake their responsibilities.

Having documented procedures for key processes and tasks makes it clearer for staff to know who is responsible for what and how the task needs to be completed. Documented tasks can be more easily assessed (and improved). New staff can also easily undertake the required tasks by following the written procedures.

BEST PRACTICE

Best practice in SUPPORTING interpretation and education is:

- ⊙ Having documented procedures to follow.
- ⊙ Identifying, training and maintaining key staff capabilities/core skills for the defined service levels and opportunities.
- ⊙ Communicating corporate and interpretation policies and standards to staff and outsourced suppliers.
- ⊙ Monitor skills so that the organisation maintains a consistent and cohesive skills base in all the required areas.

Refer also to Checklist for Best Practice: Support, in Appendix 4.

3.8.1 KEY FINDINGS

▶▶▶▶▶ Training courses and support materials have been developed

ANZECC agencies provide a variety of interpretation training courses for their staff while several agencies are actively working with the growing ecotourism industry. There are more accreditation schemes for interpretation professionals now than there were 10 years ago, including several for external providers such as ecotourism operators (see Section 3.6: Delivering).

Courses

Several agencies (e.g. CALM and QDEH) run a variety of interpretation training workshops and training courses for their staff or seasonals.

Associations such as Interpretation Australia Association and the Museum Education Association of Australia are perhaps better placed than individual agencies to organise short courses on behalf of its members on topics such as evaluation.

Support Materials

Several agencies (e.g. CALM and QDEH) provide support manuals for their interpretation staff, including corporate policies and interpretation standards (e.g. sign standards).

External contractors

The survey and the literature review found that Australian and international agencies are increasingly involved in interpretive training programs for commercial tour operators and a range of training materials have been produced for them. Several organisations have manuals, videos and courses for their tour operators (e.g. Environment Australia at Uluru National Park, PWCNT, QDEH, CALM). Some training courses for outsourced service providers are not being as well patronised as hoped partly because it seems the times and duration of the courses do not suit small business operators.

Market research liaison would help ascertain the best times and schedules to offer courses to attract small business operators/individuals, and to identify other alternative methods of training for outsourced suppliers. CALM is investigating alternative training methods for ecotourism operators such as its 'Best Recipes' book of well-trialed guided interpretive activities.

As discussed in Section 3.6 it is desirable that ANZECC agencies integrate with industry/nation-wide accreditation and training schemes.

Best Practice Example 16 **Staff Training Course**

PWCNT runs a one week 'Interpretation Walks and Talks' course every year with refresher courses every 3-4 years. The course is being submitted for National Accreditation.

Best Practice Example 17 **Training Videos**

QDEH obtained an Environment Australia grant to produce three training videos for interpreters. These service the needs of interpreters inside and outside the Department.

Best Practice Example 18 **Industry Certification Course**

The Great Barrier Reef Marine Park Tourism Certification Course was designed so that the onus of course delivery would shift from GBRMPA employees to the industry itself, allowing for more flexible delivery styles. The initiative is twofold. It:

- Provides a training system for industry staff to become accredited trainers so they can promote and conduct their own independent in-house training programs
- Provides a comprehensive Manual and Video Package as reference material to allow for self-paced training

This course serves as an accreditation standard for the delivery of interpretation services by external providers.

▶▶▶▶▶ Lack of support and training is still a concern for some

Although there are more interpretation courses available now than there were 10 years ago, a lack of career structures, staff burnout and the seasonal nature of some interpretation positions means that loss of staff and skills is an area of concern. While sharing and networking does occur between interpretation and education staff within an agency and inter-agency it is often an add-on on top of an already full workload.

Less than half of the organisations that responded to the survey have a way for assessing, tracking and maintaining skill levels within their interpretation and education services. Staff are keen to do evaluation for example but need training in this area.

In-house staff frequently need training in how to manage external contractors – this is an emerging area in the responsibility of park staff.

Part 4: CONCLUSION

4.1 Summary

4.2 Some General Observations

4.3 Some Opportunities for Further Investigation

PART 4: CONCLUSION

4.1 SUMMARY

A Model for Park Interpretation and Education

A business model was developed as part of this project to facilitate the systematic and comprehensive management of park interpretation and education services. This model addresses the five key components of the business management cycle: Define, Develop, Deliver, Evaluate, Support.

Key findings in these five areas are:

Defining

Most of the organisations surveyed consider interpretation to be core business and one of their main functions. Many have a mission statement that includes direct reference to interpretation and education. However the transfer of interpretation and education to practice within the organisation in a business sense may not be clearly understood or documented. Interpretation and education are often not clearly linked to achieving corporate goals nor integrated with other complementary functions such as communications (marketing, public affairs), enforcement, economics etc. across the organisation.

Developing

Many of the organisations surveyed reported having strategic plans for interpretation and education in place but most of these are for specific parks or projects. Few have an overall documented interpretation and education strategic plan for their organisation that identifies target audiences and objectives that clearly relate to corporate goals. Interpretation planning often does not clearly and systematically target key messages to specific audiences and these to key organisational goals and objectives. Few have appropriate Key Performance Indicators. The needs of customers are often not identified and analysed. Feedback loops are often not in place to link interpretation and education with other elements of the business cycle nor with other services or products provided by the agency.

Delivering

A wide range of interpretive and education services are offered. Clear procedures do not always appear to be in place for assigning interpretation roles and responsibilities across all relevant levels within an organisation, for communicating targets and standards, and for deciding if and when to outsource and if and when to charge for in-house services.

Evaluating

Evaluation is recognised by interpretation and education staff as an area for improvement. When it is done, evaluation is often limited because most organisations do not appear to address all components of the overall evaluation process. Objectives, Key Performance Standards and Key Performance Indicators are often not clearly established, making it difficult to measure what is being achieved.

Supporting

Several organisations have training courses and manuals to support their staff while a few are beginning to address the needs of outsourced providers. Many organisations do not have systems in place for assessing, tracking and monitoring skill levels within interpretation and education services.

4.2 SOME GENERAL OBSERVATIONS

In addition to the comments made about each stage of the Model for Park Interpretation and education, there are a number of areas where significant improvements could be made. These include:

1. The potential for taking a more comprehensive approach in each of the 5 stages (i.e. defining, developing, delivering, evaluating and supporting). In particular, improvements to the *developing* and *evaluating* stages would appear to warrant the highest priority.
2. The need to integrate each stage with the others by recognising the importance and developing the numerous *feedback loops* that should exist between each stage of the management system.
3. In a number of instances, there appears to be a tendency to place too much emphasis on the delivery of site specific messages to the detriment of those which have a wider significance, either state-wide, territory-wide or nationally, i.e. there is a tendency to focus on the importance of a particular feature or features at a site and not emphasise the significance of the site within a broader context or system of sites.
4. Anecdotal evidence suggests that the frequency of organisational change may be affecting the development of effective systems for the management of interpretation and education. Organisations need to become more adept at finding ways to maintain momentum and delivery in the face of, often inevitable, organisational change.

4.3 SOME OPPORTUNITIES FOR FURTHER INVESTIGATION

The focus of the project was to look at interpretation and education services across the spectrum of functions within a range of organisations with what turned out to be very diverse structures and systems. It was not possible to investigate any particular agency, function or activity in detail, but a number of opportunities for further investigation were identified during the course of the project. These include:

1. The need to further validate and refine the Model for Park Interpretation and Education developed as part of this project.
2. Opportunities for generic tools to be developed to assist agencies to identify the Critical Success Factors and Key Performance Indicators for their interpretation and education services. Several similar agencies could work together on the further development of one or more stages.
3. Investigation of visitor preferences and perceptions of programs delivered by Rangers compared to other field staff or contractors.
4. Development of criteria to assist an agency to decide if and when to outsource interpretation and education service delivery. Cost benefit analysis, assessment of effectiveness and establishment of standards and monitoring systems should also be developed in association with outsourcing services.
5. Development of criteria for determining levels of services and pricing mechanisms.

APPENDIX 1

Questionnaire

Guidelines for Completing the Questionnaire



Note abbreviation:

I/E = Interpretation and Education

The questionnaire is organised into 6 sections:

Section One:	Your organisation
Section Two:	Formal Requirements, Commitment and Policies
Section Three:	Planning
Section Four:	Implementation/Operation
Section Five:	Checking/Corrective Action
Section Six:	Responding to Change and Challenges/Examples of Best Practice
Appendix:	Checklist of Requested Materials

Different People could Answer Different Sections

Rather than one person complete all the questions, it may be easier for the different sections to be completed by the staff members of your organisation most directly responsible for that particular function, e.g. I/E policies and management, planning, implementing or reporting procedures. If different members of your organisation are likely to have different answers to some questions, you may want to discuss these questions internally first to arrive at an organisational consensus, or alternatively provide answers from several people, or indicate that the answer provided is only one perspective.

Answer the Easiest Questions First

The questions are intended to stimulate but not restrict or limit your responses. If you are unable to answer any of the questions easily, please skip them and answer all the questions that you can easily complete rather than not return the questionnaire on time. If there is insufficient space for your response to any question, please use the reverse side of the relevant page.

Interpretation compared to Education

The Background page provides a working definition of interpretation and education for the purposes of this project. Section Four of the questionnaire provides an overview of the kinds of interpretation and education (I/E) services available. If your organisation defines interpretation and education differently, please include a copy of your definitions. Some organisations have separate staff for delivering their education services while others combine their interpretation and education services and products. If your organisation manages its interpretation services quite differently from its education services, you could duplicate the questionnaire and complete one copy for your interpretation services and another copy for your education services (or at least complete two versions of any relevant questions in the questionnaire).

Confidentiality

All survey data will be treated as **confidential** and will not be passed onto any other organisations (with the exception that each ANZECC partner has agreed to share their agency's information with other ANZECC member organisations). In the project's report, organisations will only be named with the prior consent of the organisation involved, and then only to illustrate examples of good practice.

Time Constraint



Please complete this questionnaire by the date shown in this box.

It is critical for the project's timeline that if we are to include your organisation in the project, we must receive your completed questionnaire by this date.



Providing Samples of Documents

Copies of relevant documents are requested as part of this questionnaire. These are identified throughout the questionnaire with the above symbol. Page 19 of the questionnaire contains a checklist of all the materials requested – please don't be put off by the length of the checklist as we only want you to provide copies of materials that you can easily access. Where copies of relevant materials have been requested, please mail these separately the following week so as not to delay the return of the completed questionnaire.



Help make the resulting report relevant to your organisation's needs by contributing to this questionnaire.

Section One: Your organisation

This section aims to clarify the nature and size of your organisation.

Name(s) and position(s) of person(s) completing this section of the survey:

.....
.....

1.1 Name of your organisation:

1.2 Head office address of your organisation:

.....

1.3 Number of sites/parks/protected areas managed by your organisation:

.....

1.4 Approximate total area (ha) of sites/parks/protected areas managed by your organisation:

.....

1.5 What type of business structure does your organisation operate under?

Purchaser/Provider model Public service model Corporate Private Commercial

Other
(please describe)

1.6 Can you provide an organisational or structural chart showing the reporting chain for I/E within your organisation? Yes No

1.7 If identified as having examples of good practice in any of the areas covered by the questionnaire, does your organisations consent to being named in the report in connection with descriptions of good practice. Yes No

Section Two: Formal Requirements, Commitment and Policies

This section aims to identify any guiding rationale, legal and policy related requirements and the level of commitment to interpretation and education (I/E) services i.e. why your organisation provides these services, what is your rationale for providing I/E services and what benefits your organisation derives from them.

Name(s) and position(s) of person(s) completing this section of the survey: (if different from other sections)

.....

2.1 Does your organisation have a legislated responsibility for providing visitor information/education (e.g. National Parks Act of Parliament)? Yes No

2.2.1 Does your organisation’s Mission/Vision Statement include any reference to I/E? Doesn’t have Statement Yes No

2.2.2 If Yes, please specify at which level(s)? Department Division Park/Site

2.2.3 If Yes, can you provide a copy of the Mission/Vision Statement? Yes No

2.3.1 Does your organisation have a documented Policy specifically for guiding I/E? Yes No

2.3.2 If Yes, can you provide a copy of the policy? Yes No

2.4 If your organisation does not have a Policy specifically guiding I/E, what are the title(s) of the most relevant policies guiding your organisation’s I/E services?:

.....

2.4.1 To what extent does your organisation regard I/E as core business? I/E is:
 Extremely important Very important Fairly important Not very important Not core business
 Difficult to answer because:

2.4.2 Does your organisation consider **interpretation** to be of central importance to its operations, i.e. one of its 4 or 5 main functions? Yes No

2.4.3 Does your organisation consider **education** to be of central importance to its operations, i.e. one of its 4 or 5 main functions? Yes No

2.4.4 If Yes to 2.3.2 or 2.3.3, for which functions is I/E considered to be of central importance?: (Tick as many boxes as relevant)

<input type="checkbox"/> Increasing visitor enjoyment _____	<input type="checkbox"/> Increasing visitor awareness/understanding of park/site values _____
<input type="checkbox"/> As a management tool _____	<input type="checkbox"/> Increasing community support for the organisation/park/site _____
<input type="checkbox"/> To change visitor behaviour _____	<input type="checkbox"/> For commercial reasons _____
<input type="checkbox"/> Other (please describe)	<input type="checkbox"/> Other (please describe)

2.4.5 Please rank the function boxes ticked in 2.3.4 in order of importance (1= most important function for your organisation).

2.5 Are I/E activities designed and planned to address specific organisational goals and objectives?
 All Most Some Few None

Section Two: Formal Requirements, Commitment and Policies (continued)

2.6 How are I/E commitment and policy communicated throughout the organisation? (Tick as many as relevant)

- Formally through written documentation
 Word of mouth
 Part of policy manual
 Other
 (please describe)

2.7.1 Would you say there is a clear understanding among staff of the organisation's I/E goals and objectives? Yes No

2.7.2 If Yes, at which levels would you say there is a clear understanding of the benefits of the organisation's I/E products and services? (Tick for each level)

- | | | | | | |
|-------------------|--------------------------------|-----------------------------------|--------------------------|--------------------------------|-----------------------------------|
| • Senior managers | <input type="checkbox"/> Agree | <input type="checkbox"/> Disagree | • Middle managers | <input type="checkbox"/> Agree | <input type="checkbox"/> Disagree |
| • Planners | <input type="checkbox"/> Agree | <input type="checkbox"/> Disagree | • Interpreters/educators | <input type="checkbox"/> Agree | <input type="checkbox"/> Disagree |
| • Site managers | <input type="checkbox"/> Agree | <input type="checkbox"/> Disagree | • | <input type="checkbox"/> Agree | <input type="checkbox"/> Disagree |


2.8 Does your organisation have a process to formally identify key audiences for its I/E services? Yes No

2.9 How does your organisation decide which I/E services are provided free and which are charged for on a user fee basis?

2.10 How does your organisation decide which I/E services are outsourced and which ones cannot be outsourced?

2.11.1 Which internal policies/strategies/documents does your organisation use in planning and managing its I/E services (Tick as many as relevant)

- | | | |
|--|--|---|
| <input type="checkbox"/> Management Policy | <input type="checkbox"/> Communication Policy/Strategy | <input type="checkbox"/> Interpretation Policy/Strategy |
| <input type="checkbox"/> Education Policy/Strategy | <input type="checkbox"/> Business Plan | <input type="checkbox"/> Management Plan |
| <input type="checkbox"/> Action Plans | <input type="checkbox"/> Guidelines/Manual | <input type="checkbox"/> Other
(please describe) |

 **2.11.2** Can you provide copies of the relevant document(s)? Yes No

2.12 Approximately how frequently is I/E policies/strategies/objectives reviewed by your senior management group?

- At least annually
 Every 2 years
 Every 3 years
 Every 4 years
 Every 5 years
 Other
 (please describe)

2.13.1 Is an officer from your senior management group responsible on an organisation-wide basis for I/E policy and standards? Yes No

2.13.2 If Yes, what is this person's position title?

Section Three: Planning

This section aims to get a sense about the scope and nature of planning which occurs in your organisation when dealing with interpretation/education (I/E) services and programs. Who are the key audiences? What are the key outcomes sought? Are performance standards identified?

Name(s) and position(s) of person(s) completing this section of the survey: (if different from other sections)

.....

.....

3.1.1 Is there a documented I/E Strategy/Plan for your organisation? Yes No
(as opposed to an I/E Policy)

3.1.2 If Yes, can you provide a copy? Yes No

	All	Most	Some	None	Don't Know	Not Applicable
3.1.3 Is there a documented I/E Plan for each of your regions/areas?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3.1.4 Is there a documented I/E Plan for each park/site?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
---	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

3.1.5 Can you provide sample copies of recent relevant region/area/park or site plans? Yes No

.....

3.2.1 Does your organisation prepare Project/Program Plans (i.e for specific I/E projects) Yes No
identifying such things as resources needed, timeframes, methods and/or personnel with specific responsibilities?

3.2.2 If Yes, can you provide a copy of the Program Plan(s) Yes No

3.3 Who is involved in deciding what types and levels of I/E services your organisation will offer?
(Tick as many boxes as relevant)

- | | | | | | |
|---------------------------------------|--------------------------------------|---|--|--|--|
| <input type="checkbox"/> I/E staff | <input type="checkbox"/> Field staff | <input type="checkbox"/> Community | <input type="checkbox"/> Minister | <input type="checkbox"/> Senior managers | <input type="checkbox"/> Middle managers |
| <input type="checkbox"/> Stakeholders | <input type="checkbox"/> Visitors | <input type="checkbox"/> Education department | <input type="checkbox"/> Other:
(please describe) | | |
-
-

3.4.1 How does your organisation decide which I/E materials and programs it will provide, which audiences it will target, which approach(es)/methods are to be used [publication, sign, face-to-face], and who will deliver these I/E services?
(Tick as many boxes as relevant)

- | | |
|---|---|
| <input type="checkbox"/> By referring to its Communications or I/E Plan(s) | <input type="checkbox"/> There is no clear procedure |
| <input type="checkbox"/> Part of departmental planning process such as budgeting | <input type="checkbox"/> Informal process by group responsible for I/E |
| <input type="checkbox"/> Mainly by responding to Minister's/Senior Managers' directives | <input type="checkbox"/> By following a documented procedure |
| <input type="checkbox"/> By referring to formal visitor or market research | <input type="checkbox"/> By referring to informal visitor or market research
(e.g. feedback from site operators) |
| <input type="checkbox"/> other (please describe): | |

3.4.2 If you do have a documented procedure, can you provide a copy? Yes No

Section Three: Planning (continued)

3.5.1 Does your organisation have a formal documented commitment to any particular levels of I/E service at particular parks/sites(e.g. guarantee of service charter) Yes No

3.5.2 If Yes, can you provide a copy of the document(s): Yes No

3.6 When planning its I/E services approximately how often does your organisation use visitor and/or market research to target its programs ?

- Not at all
 Annually
 Every 2 years
 Every 3 years
 Every 4 years
 Every 5 years
 Other
(please describe)

3.7 Who are the key stakeholders for your organisation (e.g. senior managers, special interest groups)?

.....

.....

.....

3.8 Which I/E services does your organisation offer on a user pays system? (Tick as many boxes as relevant)

- Interpretation brochures/leaflets
 Visitor Centre
 A/V viewing in Visitor Centre
 Spotlight/Night Walks
 Guided tours
 Audio tapes for self-guided tours
 Self-guided walk/drive publications
 Talks by I/E personnel
 Children's activity sessions
 Theatre performances
 School group activities
 Education publications or A/Vs
 Other
(please describe)

3.9.1 Which of the following does your organisation define for I/E services? (Tick as many boxes as relevant)

- Goals
 Objectives
 Key results
 Performance Indicators
 Outcomes
 Other
(please describe)

3.9.2 If your organisation does define any of the above, can you provide a copy of the following?: (Tick which is relevant)

- Performance Standards
 Key results
 Objectives
 Outcomes

3.9.3 If your organisation sets Performance Standards for I/E services (e.g. to reach a given number of visitors, to have no complaints, to have 80% of participants assess an I/E activity as high quality), how does it decide on these Standards?:

.....

.....

.....

.....

.....

Section Three: Planning (continued)

3.10.1 Does your organisation have a formal process to decide which particular audience groups to target? Yes No

3.10.2 Which of the following if any does your organisation consider key audiences to target? (Only tick the key ones)

- | | | | |
|--|--|--|--|
| <input type="checkbox"/> First time visitors _____ | <input type="checkbox"/> Repeat visitors _____ | <input type="checkbox"/> Non visitors _____ | <input type="checkbox"/> People who live near the site _____ |
| <input type="checkbox"/> Neighbours _____ | <input type="checkbox"/> Experts _____ | <input type="checkbox"/> Schools _____ | <input type="checkbox"/> Tertiary institutions _____ |
| <input type="checkbox"/> Ethnic groups _____ | <input type="checkbox"/> Overseas visitors _____ | <input type="checkbox"/> Interstate visitors _____ | <input type="checkbox"/> Special interest groups _____ |
| <input type="checkbox"/> Other
<small>(please describe)</small> | <input type="checkbox"/> Other
<small>(please describe)</small> | | |

.....

3.10.3 Please rank your key audiences in order of importance from 1 to 5 (1 = most important) by writing a number beside each of the boxes you tick in 3.10.1.

3.11.1 Does your organisation identify key messages for I/E services? Yes No

3.11.2 If Yes, are these messages targeted to specific audiences? Yes No

3.11.3 If Yes to 3.11.2, is this process documented? Yes No

3.11.4 If Yes, can you provide a copy of the document? Yes No

3.11.5 If No to 3.11.3, please briefly describe the process your organisation uses for deciding which messages to target to which audiences?:

.....

3.12.1 When a new service is introduced, does your organisation have a formal way of assessing whether it can be maintained in future (e.g. a commitment to maintaining funding or updating information) Yes No

3.12.2 If Yes, can you provide a copy of the document? Yes No

3.12.3 If it is not formally documented, please briefly describe the process:

.....

3.13 Please list the most important references used by your organisation in planning its I/E services (*i.e.* titles of reference books or journal articles). (no more than 5)

.....

Section Four: Implementation/Operation

This section aims to find out what interpretation and education (I/E) services your organisation delivers and who delivers them, and what budgets and staffing levels are allocated to I/E services.

Name(s) and position(s) of person(s) completing this section of the survey: (if different from other sections)

.....

.....

Visitors/Customers

4.1.1 Approximate total number of visitors to your site(s) per year:

.....

4.1.2 Approximately what percentage of visitors are involved in formal on-site **interpretation** programs
 (It is understood that these figure only cover services that can easily be quantified e.g. face-to-face visitor programs, number of visitors entering Visitor Centres):

Free services	%	User pays activities	%
Total	%		

.....

.....

4.1.3 Approximately what percentage of visitors are involved in formal on-site **education** programs
 (e.g. students booking in for educational activities)

Free services	%	User pays activities	%
Total	%		

.....

.....

4.1.4 Approximately what number of users take part in **off-site** I/E programs:

Free services	%	User pays activities	%
Total	%		

.....

.....

I/E personnel

4.2.1 Approximate total number of staff in your organisation:

.....

4.2.2 Approximate number of people involved in delivering I/E services for your organisation:

	Full time	Part-time	Casual/Seasonal	Volunteers	Contractors
Interpretation services:
Education services:

.....

.....

Section Four: Implementation/Operation (continued)

4.3.1 Percentage of your organisation's **on-site face-to face interpretation** services physically delivered by:

- | | | | | | |
|---------------------------|-------------------------------|------------------------------------|------------------------------------|-----------------------------------|-------------------------------|
| • Staff (permanent) | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Seasonal staff | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Outsourced Contractors | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Volunteers | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Other (please describe) | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |

4.3.2 Percentage of your organisation's **on-site passive interpretation** services (e.g. signs, publications) written by:

- | | | | | | |
|---------------------------|-------------------------------|------------------------------------|------------------------------------|-----------------------------------|-------------------------------|
| • Staff (permanent) | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Seasonal staff | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Outsourced contractors | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Volunteers | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Other (please describe) | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |

4.3.3 Percentage of your organisation's **on-site face-to-face education** services physically delivered by:

- | | | | | | |
|---------------------------|-------------------------------|------------------------------------|------------------------------------|-----------------------------------|-------------------------------|
| • Staff (permanent) | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Seasonal staff | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Outsourced contractors | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Volunteers | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Other (please describe) | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |

4.3.4 Percentage of your organisation's **on-site self-guided education** services (e.g. self-guided activity materials) written by:

- | | | | | | |
|---------------------------|-------------------------------|------------------------------------|------------------------------------|-----------------------------------|-------------------------------|
| • Staff (permanent) | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Seasonal staff | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Outsourced Contractors | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Volunteers | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |
| • Other (please describe) | <input type="checkbox"/> 100% | <input type="checkbox"/> 99% - 60% | <input type="checkbox"/> 59% - 30% | <input type="checkbox"/> 29% - 1% | <input type="checkbox"/> None |

Section Four: Implementation/Operation (continued)

4.4.1 What accreditation criteria/standards (internal/organisational or industry based) does your organisation set for those who deliver its I/E services/products?


	Internal	Industry	Don't have accreditation criteria/standards
• Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Contractors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Volunteers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

.....

.....

.....

.....

 **4.4.2** If your organisation sets its own accreditation criteria/standards, can you provide a copy? Yes No

.....

4.5.1 Does your organisation have a way for formally assessing, tracking and maintaining skill levels within its I/E services (to maintain skill levels when experienced I/E staff leave) Yes No

4.5.2 If Yes, please briefly describe:

.....

.....

.....

Outsourcing

4.6.1 What types of I/E services are outsourced to contractors:

.....

.....

.....

.....

4.6.2 What types of I/E services are provided by volunteers:

.....

.....

.....

.....

4.6.3 Are the processes used by your organisation for training/monitoring/evaluating outsourced I/E services any different from those for providing internally supplied I/E services? Yes No

If Yes, please describe these outsourcing process(es)

.....

.....

.....

Section Four: Implementation/Operation (continued)

Delivery of Interpretation Services

4.8 Type(s) of interpretation services your organisation delivers:

First tick all relevant boxes. Then for each ticked box rate the priority your organisation places on delivering this type of I/E service by circling either H, M or L beside it.

H = High priority; regarded as one of the main I/E services to offer
 M = Medium priority
 L = Lower priority: offered as needed or occasionally

e.g. Visitor Centre: H (M) L

Pre-visit

- | | |
|--|--|
| <input type="checkbox"/> Interpretation brochures/leaflets: H M L | <input type="checkbox"/> Broadcast media: H M L |
| <input type="checkbox"/> Internet site: H M L | <input type="checkbox"/> Video: H M L |
| <input type="checkbox"/> Other: H M L
<small>(describe)</small> | <input type="checkbox"/> Other: H M L
<small>(describe)</small> |

On-site activities

- | | |
|---|--|
| <input type="checkbox"/> Visitor Centre: H M L | <input type="checkbox"/> Guided Walks/Drives/Dives/Tours: H M L |
| <input type="checkbox"/> Audio tapes: H M L | <input type="checkbox"/> Spotlight/Night Walks: H M L |
| <input type="checkbox"/> Theatre performances: H M L | <input type="checkbox"/> Talks by I/E personnel: H M L |
| <input type="checkbox"/> Self-guided Walk/Drive publications: H M L | <input type="checkbox"/> Interpretation signs: H M L |
| <input type="checkbox"/> School group activities: H M L | <input type="checkbox"/> Children's activity sessions: H M L |
| <input type="checkbox"/> Other: H M L
<small>:: (describe)</small> | <input type="checkbox"/> Other: H M L
<small>(describe)</small> |
| <input type="checkbox"/> Other: H M L
<small>:: (describe)</small> | <input type="checkbox"/> Other: H M L
<small>(describe)</small> |

Post-visit

- | | |
|--|--|
| <input type="checkbox"/> Internet site: H M L | <input type="checkbox"/> Interpretive brochures/leaflet about park(s): H M L |
| <input type="checkbox"/> Books: H M L | <input type="checkbox"/> Video: H M L |
| <input type="checkbox"/> Other: H M L
<small>(describe)</small> | <input type="checkbox"/> Other: H M L
<small>(describe)</small> |
| <input type="checkbox"/> Other: H M L
<small>(describe)</small> | <input type="checkbox"/> Other: H M L
<small>(describe)</small> |

Off-site

4.9 What other types of interpretation products and services, if any, does your organisation offer off-site?

.....

4.10 What types of interpretation products and services, if any, does your organisation target to non-visitors?

.....

Section Four: Implementation/Operation (continued)

Budgets

The following budget related questions are optional but you are encouraged to provide these details to allow for identification of best practice in relation to organisational size and budget and for a meaningful audit tool to be developed to suit different sized organisations

4.13.1 Approximate total annual operations budget for your organisation:

- \$0 - \$1 Million \$1 Million – 10 Million \$10 Million - \$100 Million More than \$100 Million

4.13.2 Approximate annual operations budget for Interpretation (or percentage of total operations budget):

- \$0 - \$100,000 \$100,000 - \$500,000 \$500,000 - \$1 Million More than \$1 Million

.....
4.13.3 Approximate annual operations budget for Education (or percentage of total operations budget):

- \$0 - \$100,000 \$100,000 - \$500,000 \$500,000 - \$1 Million More than \$1 Million

.....
4.14.1 Approximate annual total budget for staff salaries and on costs:

- \$0 - \$1 Million \$1 Million – 10 Million \$10 Million - \$100 Million More than \$100 Million

.....
4.14.2 Approximate annual budget for Interpretation staff salaries and on costs (or percentage of total staff salaries budget):

- \$0 - \$100,000 \$100,000 - \$500,000 \$500,000 - \$1 Million More than \$1 Million

.....
4.14.3 Approximate annual budget for Education staff salaries and on costs (or percentage of total staff salaries budget):

- \$0 - \$100,000 \$100,000 - \$500,000 \$500,000 - \$1 Million More than \$1 Million

.....
4.15 Which of the following best describes your organisation’s process for determining the number of I/E staff and the I/E operations budget allocation. (Tick as many boxes as relevant)

- | | |
|---|---|
| <input type="checkbox"/> Integral part of organisation’s staffing and budgeting process | <input type="checkbox"/> Integral part of corporate planning process |
| <input type="checkbox"/> In response to new legislation | <input type="checkbox"/> Based on government or stakeholder direction |
| <input type="checkbox"/> Allocated as a secondary/lower priority than core projects | <input type="checkbox"/> Based on programs proposed by Manager of I/E staff |
| <input type="checkbox"/> Other: | |

(describe)

Section Five: Checking/Corrective Action

This section is about how organisations measure, monitor, evaluate and improve their interpretation and education (I/E) services, and what reporting systems are in place throughout the organisation for improving their I/E services in terms of effectiveness, efficiency, and equity.

Name(s) and position(s) of person(s) completing this section of the survey: (if different from other sections)

.....

.....

Evaluating and Monitoring

5.1.1 Is there a formal process within your organisation for regularly reviewing its I/E services? Yes No

5.1.2 If Yes, please indicate at which level this review is conducted:
 As part of an organisation-wide review Review of I/E programs Review of specific I/E project(s)

5.1.3 If your review process is documented, can you provide a copy of the review process? Yes No

5.1.4 If No to 5.1.3, please briefly describe the process your organisation uses for reviewing the performance of I/E services:

.....

.....

.....

5.2 What level of financial commitment does your organisation place on monitoring and evaluating its I/E services?
 10-20% of I/E operations budget 5-10% of I/E operations budget Less than 5% of I/E operations budget
 Nil Other:
 (describe)

5.3.1 Does your organisation conduct formal visitor research to assess how visitors use the site(s)/park(s)?
 (Tick as many boxes as relevant)
 Annually Bi-annually Every 3-5 years Every 5-10 years
 For most sites/parks For some sites/parks

5.3.2 Does your organisation conduct formal visitor research to assess how satisfied visitors are with I/E services at your site(s)/park(s)? (Tick as many boxes as relevant)
 Annually Bi-annually Every 3-5 years Every 5-10 years
 For most sites/parks For some sites/parks

5.3.3 Does your organisation conduct formal market research to assess what I/E services non-visitors want from your site(s)/park(s)? (Tick as many boxes as relevant)
 Annually Bi-annually Every 3-5 years Every 5-10 years
 For most sites/parks For some sites/parks

Section Five: Checking/Corrective Action (cont.)

5.4 Whose feedback is sought when assessing your organisation's existing I/E services and products?

(Tick as many boxes as relevant)

- I/E staff Visitors First-time visitors Repeat visitors Non-visitors
 Professional organisations Stakeholders Other.....
(describe):

5.5.1 If your organisation sets performance levels/standards for its on-site I/E programs to achieve, how does it assess/measure if these have been reached? (Tick as many boxes as relevant)

- Via formal visitor surveys Via informal visitor surveys Via I/E staff
 Via specialist contractors Other:
(describe):

5.5.2 If Yes, can you provide a copy of these assessment instruments? Yes No

5.5.3 If your organisation offers off-site education products or services, does it set performance standards for them? Yes No Doesn't offer

5.5.4. If Yes, please describe how your organisation evaluates performance of off-site education services?
.....
.....

5.6 How does your organisation evaluate I/E services and products targeted at non-visitors?
.....
.....
.....
.....

5.7.1 Does your organisation regularly and formally track the supply and condition of its non-personal I/E material (signage, publications, displays, Internet)? Yes No
(e.g. the supply of publications, whether they are out of date, the condition of displays)

5.7.2 If Yes, can you provide a copy of this documented process? Yes No

Accuracy

5.8.1 Is there a documented process in place in your organisation for assuring that its I/E materials are consistent with the organisation's Policy/Directions Statement? Yes No
.....

5.8.2 Is there a documented process in place in your organisation for assessing the scientific accuracy of its I/E materials and programs? Yes No
.....

5.8.3 Is there a documented process in place in your organisation for assessing the cultural accuracy of its I/E materials and programs? Yes No
.....

5.8.4 If Yes to 5.8.2 or 5.8.3, can you provide a copy of this documented process? Yes No
.....

Section Five: Checking/Corrective Action (cont.)

5.8.5 If there is no formal process, is there an informal process in place Yes No
in your organisation for assessing the scientific and cultural accuracy of its I/E materials and programs?

5.8.6 If Yes, please briefly describe:
.....
.....

5.8.7 What criteria does your organisation use to assess the accuracy of its I/E materials and programs?
.....
.....

Effectiveness

5.9.1 Does your organisation have a process in place for assessing the short-term effectiveness Yes No
of its I/E materials and programs? (e.g. whether I/E materials lead to an increase in visitor
.....understanding of trampling damage which then results in most visitors staying on designated walking tracks)

5.9.2 Does your organisation have a process in place for assessing the longer-term effectiveness Yes No
of its I/E materials and programs? (e.g. increased community understanding and support
of the role of parks in biodiversity conservation)

5.9.3 If Yes to 5.9.1 or 5.9.2, and this process is documented, Yes No
can you provide a copy of the document(s)?

5.9.4 What criteria does your organisation use to assess the effectiveness of its I/E materials and programs?
.....
.....
.....

5.9.5 If your organisation has a process for assessing short and/or longer-term effectiveness of I/E materials
and programs that is not documented, please briefly describe the process(es):
.....
.....

Reporting

5.10.1 Does your organisation have identified Key Performance Measures for its I/E services? Yes No

5.10.2 If Yes, can you provide a copy of these Key Performance Measures? Yes No

5.10.3 If Yes to 5.10.1, please indicate which approach is used Integrated organisation level measurement system
 Separate park/site measurement system

5.10.4 If Yes to 5.10.1 how does feedback on I/E services get processed and reported to senior management?
(Tick as many boxes as relevant)
 Informally Via a formal system Via a documented system Other:
(describe):

5.10.5 If your organisation has a documented reporting system for I/E services, Yes No
can you provide a copy?

Section Six: Responding to Change and Challenges

This section encourages your organisation to share any innovations and lessons it has learnt from past experiences. What particular challenges face your organisation? How is it dealing with them/how has it dealt with them? What systems and methods help organisations deal with challenges and change facing interpretation/education (I/E) services. What can we learn from each other?

Name(s) and position(s) of person(s) completing this section of the survey: (if different from other sections)

.....

.....

Past

7.1.1 Are the current I/E services and products offered by your organisation very different from those provided 5-10 years ago? Yes No

7.1.2 If Yes, please briefly describe how your current programs I/E services from past I/E services, and if appropriate, the reasons for these change(s) (e.g. policy change, staff change, priority change, budget change)

.....

.....

.....

.....

Future opportunities

8.1 Does your organisation actively try to identify new opportunities for its I/E services? (e.g. new audiences, new methods, new marketing initiatives) Yes No

If Yes, please briefly describe:.....

.....

8.2 Please briefly describe any particular lessons you learnt from past successes or failures of I/E services (your organisation's or those of another's) that you would like to share (please feel free to attach additional information):

.....

.....

.....

9.1 Please briefly describe any innovations you have adopted to respond to particular challenges facing I/E services (please feel free to attach additional information):

.....

.....

.....

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.....

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.....

.....

Examples of Best Practice

10.1 Which organisations, if any, do you regard as having good practice and procedures in any of the following areas with regard to their I/E services. Please provide their name, the area(s) you consider they have good practice, and briefly describe why.

Organisation's name	Planning	Monitoring	Evaluating	Reporting	Why
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e.g. *Fictitious Park Service*



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Other comments

11.1 Any other comments on questions raised by this questionnaire (please feel free to attach additional page):

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Appendix: Checklist of Requested Materials



Note abbreviation:

I/E = Interpretation and Education



Samples of documents

Copies of relevant documents produced by your organisation's are identified throughout the questionnaire with the above symbol . Please don't be put off by the length of this checklist – it's just a summary of what we have asked for but we only want you to provide copies of materials that you can very readily access. Please post these documents during the following week so as not to hold up the return of your completed questionnaire.

Post to Reply Paid 37, Earthlines, P.O. Box 128, Heidelberg West, 3081, Victoria, Australia.

Section One: Your Organisation

- Structural chart showing the reporting accountability/responsibility for I/E within your organisation

Section Two: Formal Requirements, Commitment and Policies

- Your organisation's Mission/Vision Statement if it includes any reference to I/E
- Any documented Policy(s) specifically guiding your organisation's I/E, e.g. Interpretation Policy Education Policy
- Any other internal policies/strategies/documents your organisation uses in planning and managing its I/E services, e.g.
 - Management Policy Communication Policy/Strategy Management Plan Interpretation Strategy
 - Education Strategy Business Plan Principle Action Plans Guidelines/Manual

Section Three: Planning

- Your organisation's I/E Strategy or Plan
- A sample I/E Plan for one Region or Area
- A sample I/E Plan for one Park or Site
- A Project Plan for I/E activities (e.g. specifying organisational goals and objectives to be addressed, the resources needed, timeframes, methods and/or personnel with specific responsibilities)
- Procedure your organisation uses to decide which I/E materials and programs it will provide, which audiences it will target, which approaches to be used and who will deliver these I/E services
- Document of commitment to a particular level of I/E service (e.g. guarantee of service charter)
- Your organisation's standards for its I/E services (e.g. Performance Standards, Key Results, Objectives, Outcomes)
- Procedure for deciding which key messages to target to which key audiences
- Procedure for assessing funding/updating commitment needed to maintain a new service

Section Four: Implementation/Operation

- Your organisation's accreditation criteria/standards for those who deliver your organisation's I/E services/products

Section Five: Checking/Corrective Action

- Process for reviewing I/E materials and programs
- Survey instrument used for formal visitor surveys
- Sample copies of questions used for informal visitor surveys
- Procedure used by your organisation to formally track the supply and condition of its non-personal media
- Procedure used for assuring that I/E materials are consistent with the organisation's Policy/Directions Statement
- Procedure and/or criteria used for assessing the scientific and/or cultural accuracy of I/E materials and programs
- Procedure and/or criteria used for assessing the effectiveness of I/E materials and programs
- Performance measures for I/E services
- Process for reporting on I/E services feedback to management

***Thank You for your comments and contributions to this project.
Your time and effort and sincerely appreciated***

APPENDIX 2

Literature Review and Bibliographies

Interpretation Literature Review Summary Table

Bibliography: Interpretation Literature

Bibliography: Business Processes and Systems Literature

INTERPRETATION LITERATURE REVIEW SUMMARY TABLE

KEY COMPONENTS	MAIN ISSUES/TRENDS	REFERENCES
DEFINING		
Definitions of interpretation	The quest for a universally accepted definition of interpretation continues. A number of agencies in Australia and internationally have developed and adopted their own definitions of interpretation, occasionally using terms like 'information' and 'education' and 'communication' instead of interpretation. This evolution of the labelling and definition of interpretation may have led to a devaluing of the field.	Beckmann (1992), Black & Mackay (1995), Ham (1997), Knapp (1997), McArthur & Hall (1996), O'Brien (cited in Cheatley 1989).
Legislation	Information/education functions are enshrined in the enabling legislation of most agencies but the decision between core and non-core functions and transferring of the legislative framework to practice is not straightforward.	Beckmann (1992), Cheatley (1989)
Mission statements, corporate plans and policies	Many mission statements and corporate plans identify interpretation/ education as a key activity and the transmission of this intent to actual policies is becoming more common.	Canadian Heritage (1994), Victorian Department of Conservation and Natural Resources (c. 1993), Northern Territory Parks and Wildlife Commission (1997), Royal Botanic Gardens Melbourne (1997), Sutherland (1996), Western Australian Department of Conservation and Land Management (1988)
Organisational structures	In the late 1980s, most Australian agencies had a section with specific responsibility for the areas of interpretation, information, education, community education and visitor services. In line with 1990s approaches to organisational management, many agencies are assuming new organisational structures – purchaser-provider, centralised-decentralised etc.	Beckmann (1992), Sharpe (1976)
Budgets	The resources allocated to interpretation are variable within and between Australian park management agencies. There is, however, general agreement that government funding has become extremely limited – both in Australia and internationally. The lack of resources has meant that agencies have adopted various cost saving or revenue raising strategies including: using volunteers, user pays, donations, reducing labour costs, using commercial operators and charging an environmental levy at local government level. Other overseas revenue raising strategies include solicitation of corporate donations and use of gift catalogues.	Resources - Christensen (1990), Dutton (1992), Nephin Consulting Partners (1997), Stetski (1994a), Tatnell (1989), Vander Stoep (1988) Revenue raising – Beckmann (1992), Cheatley (1994), Victorian Department of Natural Resources and Environment (1997), Howard (1992 and 1997), Nephin Consulting Partners (1997), Sautter (1989), Stetski (1994a), Vander Stoep (1988)

KEY COMPONENTS	MAIN ISSUES/TRENDS	REFERENCES
DEVELOPING		
Strategies	Numerous management agencies in Australia and internationally are now producing strategic documents focussing on interpretation and visitor services.	Brisbane City Council (1997), Centennial Park and Moore Park Trust (1996), Environment ACT (1998), McPherson (1994/5), Northern Territory Parks and Wildlife Commission (n.d. b), Phillip Island Nature Park (1998), Queensland Department of Environment and Heritage (1998b), Turner (1993), Winkworth, James & Freeman (1994)
Interpretive plans and planning	<p><i>Planning</i> Almost all agencies and practitioners readily acknowledge that interpretation requires planning and numerous interpretive plans have been produced. Sometimes interpretive plans form part of a larger document (e.g. a management plan) and, if so, they are generally not very detailed.</p> <p>Parks Canada revised its interpretive planning process to include three levels: regional interpretive systems, park plans and interpretive management units. A modified form of this approach has been used by some Australian park management agencies which sought models in their North American counterparts.</p> <p>Dutton, however, observes that much interpretive planning is not conducted systematically by using clear objectives and policies. He also argues that more emphasis on planning at the management planning level would lead to more satisfactory interpretive programs.</p> <p>O'Brien argues that continuing instability in the continuity of support for interpretation has led to an unsatisfactory level of planning.</p> <p><i>Planning support</i> As planning became a recognized component of interpretation, detailed guidelines and handbooks were published in Australia and overseas.</p>	<p>Planning issues - Beckmann (1992), Dutton (1992), Hall & McArthur (1996 and 1998), Hill (1992), Howatt (1993), McArthur & Hall (1996), Northern Territory Parks and Wildlife Commission (n.d. a and c), O'Brien (1988), Sandford (1994 and c. 1996), Stevens (1989).</p> <p>Planning support – Beckmann (1992), Molloy (1992)</p>
Interpretation at a regional level	The increasing use of interpretive planning at a regional level indicates a more strategic approach to the whole field.	Black & Mackay (1995)
Audience awareness	Agencies in Australia and overseas are increasingly using visitor surveys and other instruments for learning about their audiences. In addition, there is acknowledgment of basic population shifts and their impacts on audiences (e.g., Baby Boom generation, multiculturalism, higher environmental awareness).	Cheatley (1994), Stetski (1994a), Vander Stoep (1988)

KEY COMPONENTS	MAIN ISSUES/TRENDS	REFERENCES
DELIVERING		
Alternative models of delivery	Australian and international agencies are starting to adopt privatization and contracting models as alternative methods of delivery. Furthermore, many management agencies are gradually relying on commercial tour operators, coach drivers etc to deliver interpretation to their clients. This has aroused some concerns regarding quality and commitment.	Forestry Tasmania (1994), Gadd (1992), Graystone (1995), Howard (1997), Neale (1989), Stetski (1993/4 and 1994b), Uptis (1989), Vander Stoep (1988)
Training of commercial tour operators	Australian and international agencies are increasingly involved in interpretive training programs for commercial tour operators and a range of training materials (manuals, videos, workbooks etc) have been produced.	Black & Mackay (1995), Brown (1993), Howard (1997), Neale (1989), Tatnell (1989), Uptis (1989), Vander Stoep (1988), Welch (1995)
Occupational standards and certification	The US National Association for Interpretation has recently introduced a multi-level Certification Program for their members. In Canada, National Occupational Standards for Heritage Presenters have been prepared with industry input and also by Parks Canada for their agency use. In Australia, a set of occupational standards for ecotour guides is currently being developed.	Merriman (1998), Weiler & Crabtree (1998), Ontario Tourism Education Corporation (in prep)
Performance standards	Numerous Australian and international agencies have produced sets of standards for particular aspects of interpretation (e.g. standards for on-park interpretation and public contact, heritage presentation standards, public programs).	Harmon-Price (1989), Parks Canada (1997), Queensland Department of Environment and Heritage (1998a), Western Australian Department of Conservation and Land Management (1988)
EVALUATING		
Evaluation	Most Australian and international agencies acknowledge that evaluation is required but, for a range of reasons, there is limited implementation. Publication of the results of evaluation programs is rare.	Dutton (1992), Friend (1997), Howard (1997), Pearce & Moscardo (1985)
Benchmarking and best practice	Although the concepts of benchmarking and best practice are receiving popular support, there is little research published on their application to interpretation/education.	Francis (1997), Howard (1997/8), Moscardo (1995), Weiler & Crabtree (1998)
Awards schemes	Numerous professional organizations for interpreters run Awards schemes to recognize examples of best practice (e.g. Society for Interpreting Britain's Heritage, National Association for Interpreters, Interpretation Australia Association).	Capelle (1998)
SUPPORTING		
Staffing	In numerous Australian and international agencies, volunteers and pools of trained seasonal interpreters are considered critical to the delivery of interpretation.	Gadd (1992), Graystone (1995), Hill (1992), Howard (1992 and 1997), Nephin Consulting Partners (1997),
Training	In Australia, many government agencies are producing training manuals for interpretation staff.	Bolwell & Sutherland (1995), Howard (1997)

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APPENDIX 3

Information about Business Processes and Systems

Business Process

Customer Definition

Core Business Process Competencies

Business Process Classification

Critical Success Factors

Key Performance Indicators

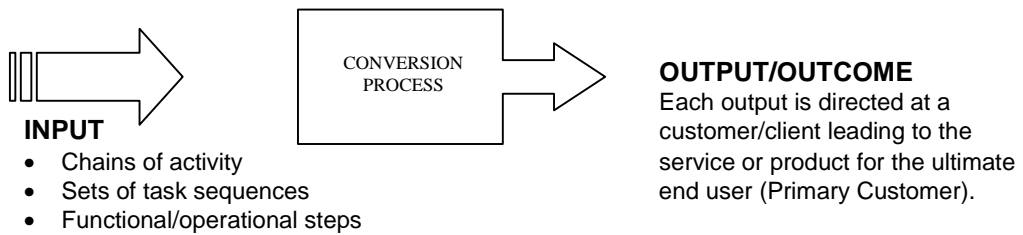
BUSINESS PROCESS

A **Business Process** is a

- Set of operational or functional steps, or
- Sequence of tasks, or
- Chain of activities

that converts inputs to outputs or outcomes. Each outcome is directed at an internal or external client/customer (the Secondary Customer) leading to the service or product for an ultimate end user (the Primary Customer)

Business Processes convert inputs to outputs or outcomes.



CUSTOMER DEFINITION

Primary Customers are those who are the end user of a service.

Typical Primary Customers for interpretation and education services are site visitors, prospective site visitors, students and citizens.

Secondary Customers are those who are part of the business chain of activities that eventually produces and delivers the service.

Secondary Customers for interpretation and education services include the Minister and Cabinet, Treasury, Agency staff, stakeholder groups, suppliers, contractors and ecotourism operators.

BUSINESS PROCESS CLASSIFICATION FOR INTERPRETATION AND EDUCATION SERVICES

The Business Process Classification is a detailed guide to understanding and locating the types of processes that occur in agency throughout the business cycle. Understanding how and where interpretation and education services for a primary customer fit within this Business Process Classification can help in identifying all the steps in the delivery of quality interpretation and education services.

The classification describes activities within 12 broad categories and many sub categories. While all activities and programs should observe the fundamentals of this process (summarised in the Define, Develop, Deliver, Evaluate, Support model), only major interpretation and education projects will warrant full application of all the steps listed here.

Operating Components

1. **Responding to Policy Mandates and Accountability**
 - Minister and Cabinet
 - Legislation
 - Specific policies
 - The budget process
2. **Understanding Markets and Customers**
 - Determine customer needs and wants
 - Measure customer satisfaction
 - Monitor changes to market and customer expectations
3. **Developing Vision and Strategy**
 - Monitor external environment
 - Define business concept, mission and organisational strategy
 - Define relationships between business units
 - Set business organisational goals
4. **Designing Products and Services**
 - New product/service concepts and plans
 - Pilot new products/services
 - Refine and further test
 - Manage the new product/service implementation strategy
5. **Marketing and Promoting**
 - Market products/services to customer segments
 - Pricing arrangements/strategy
 - Forecasting customer take up
 - Advertising/communication strategy
 - Sell or provide products/services to various customer groups
6. **Producing and Delivering in a Service Context**
 - Select and certify suppliers
 - Determine appropriate technology
 - Define skill competencies and train staff
 - Confirm service requirements for specific visitor groups at park level, in the wider community and for schools
 - Schedule resources to meet service requirements
 - Deliver direct services to customers
 - Ensure quality of service
7. **Following Up Primary and Secondary Customers**
 - Initiate billing arrangements
 - Provide service implementation support and advice to commercial contractors
 - Respond to all customer complaints
 - Respond to customer information requests

Management and Support Components

8. **Developing and Managing Human Resources**
 - Develop/Implement human resource development strategy
 - Determine human resource costs/budget
 - Design work
 - Define work competencies
 - Define work force profile
 - Recruit and train
 - Manage employee performance/appraisals, reward/recognition, satisfaction and decision participation
 - Develop/manage human resource development information systems
9. **Managing Physical and Financial Resources**
 - Budget development
 - Manage allocation of cash flows
 - Design/implement accounting standards and financial reporting systems
 - Manage financial transactions (payroll, accounts payable, purchasing, etc)
 - Manage park assets
 - Ensure inventories and valuations of park assets
 - Ensure locality/site maintenance
 - Manage physical risk
 - Manage capital planning
 - Manage information systems (business and customer records, internal/external communication strategies/systems, libraries, publications, research liaison)
 - Manage systems technology
10. **Environmental Management**
 - Meet statutory environmental/pollution control requirements
 - Meet statutory public health requirements
 - Development/implement environmental/public health monitoring systems
11. **Managing External Relationships**
 - Interdepartmental coordination
 - Stakeholder liaison
 - Neighbour relationships
 - Supplier/contractor relationships
 - Macro communication of I/E values
12. **Managing Improvement and Change**
 - Quality systems
 - Benchmarking
 - Performance measurement

[Source: Adapted from American Productivity and Quality Centre]

CORE BUSINESS PROCESS COMPETENCIES

Core Business Process Competencies are the key business capabilities that operate within all business processes and give an organisation the leading edge in customer satisfaction.

They provide a basis for the development of Critical Success Factors (CSFs) and Key Performance Indicators (KPIs).

The following Core Business Process Competencies have been drafted for use by ANZECC Agencies in the interpretation and education services context:

Customer Service Orientation

The capability to maintain a responsive focus on customer needs in all business processes.

Protection of the Environment

The capability to maintain a focus on environmental protection/heritage preservation in all business processes.

Product Innovation

The capability to continuously review and make improvements that are in line with the values and objectives identified for interpretation and education services in all business processes.

Cost Effectiveness

The capability to chose solutions, methods and work practices that yield the best value for money and resources invested in all business processes.

CRITICAL SUCCESS FACTORS (CSF)

Critical Success Factors are the significant activities or transactions in a business process that result in the desired output or lead to objectives being met. Benchmarking is used to analyse the Critical Success Factors in a business process.

CSFs are:

- Descriptions of best practice
- Performance standards for best practice

CSFs must be:

- Clearly described
- Measurable or assessable

CSFs can be:

- 1) The **output of a process** including the product or service provided to a primary customer (end user) or a secondary customer.

Primary Customer

e.g.

- *Communicating to visitors about the fauna, flora, geological, historical and cultural values of a park in an accurate and exciting way.*
- *Ensure visitors are provided with a park experience which makes them want to visit again and to tell their friends about it.*

Secondary Customer

e.g.

- *The provision of clear objectives/guidelines to Interpretation/Education staff as to the park management messages to be delivered to Interpretation/Education activity participants.*
- *Specification of the accreditation standards that must be met by a commercial ecotourism operator when delivering Interpretation/Education services to park visitors.*

- 2) A sub component or part of the output.

Primary customer

e.g.

- *The use of appropriate communication techniques such as internet, brochures, signage and face to face interaction to convey park messages to different audiences at different stages of the trip cycle.*
- *Ensure all walkways, viewing platforms and other visitor amenities are safe in all weathers, clean and promote visitor comfort.*

Secondary Customer

e.g.

- *Provide to writers and designers the style requirements for content and standard of graphics for interpretive brochures.*
- *Commercial ecotourism operators are required to consult with a designated university faculty during their preparations of Interpretation/Education resource materials.*

- 3) Inputs provided at the start of the process

e.g.

- *Ensuring that a comprehensive Interpretation/Education needs analysis is available to senior Departmental staff to support their budget negotiations with Treasury.*
- *Making sure a model which projects the maximum safe daily visitor numbers to National parks is available at the outset to inform the development of a statewide Interpretation/Education planning strategy.*

- 4) Activities occurring within a process

e.g.

- *Keeping the Minister informed of stakeholder reaction to the implementation of a seasonal commercial fishing ban placed on a local fishery to enable park visitors closer access to dolphin pods.*
- *Ensuring that ranger rostering enables a sufficient workforce presence to provide Interpretation/Education support during the running of school camps in the park.*

KEY PERFORMANCE INDICATORS (KPI)

Key Performance Indicators are the criteria and tools used to measure or assess how well Critical Success Factors have been achieved.

Performance indicators types include:

Quantitative KPIs

- the amount of a product or service
e.g. *the number of park visitors, the number of information centres*

Qualitative KPIs

- structured perception or structured feedback
e.g. *customer satisfaction levels, accreditation of educational resources, peer review of professional practice*

Cost efficiency KPIs

- the unit cost of achieving a specified amount of service
e.g. *the dollar cost of interpreting to one park visitor for an hour*

Cost effectiveness KPIs

- the unit cost of achieving a specified amount of service to a designated level of quality
e.g. *the dollar cost of interpreting to one park visitor for one hour at a high level of customer satisfaction*

Timeliness/Responsiveness KPIs

- The time taken to perform a service, or the number of transactions or products within a time cycle
e.g. *each visitor is greeted by the ranger within 1 hour of park entry*
e.g. *the number of park interpretation brochures which can be developed to pre publication standard on a 3 monthly basis*
e.g. *the average time required to prepare an Interpretation Plan for a world heritage listed national park*

Work team productivity KPIs

- the amount of output of a workforce unit or group
e.g. *3 Interpretation/Education staff have a combined workload capacity to provide 10 sessions of 30 minutes duration to visitor groups of 25 people in the course of a week*

APPENDIX 4

Checklists for Best Practice in Interpretation and Education

Defining

Developing

Delivering

Evaluating

Supporting

CHECKLISTS

The following checklists are provided for each stage of the Business Model of Park Interpretation and Education. Agencies can use these checklists as part of the process of developing best practice for activities relating to that stage.

Major projects should attempt to cover every step in the checklist while smaller projects need only focus on those aligned to the left of the checklist in a slightly larger font.

**BEST PRACTICE in
DEFINING
Interpretation and Education**

- Identify all relevant Ministerial, legislative, policy, governmental and other requirements
 - Incorporate all relevant community, customer, environmental, heritage or scientific values into goals
- Use the above requirements to derive interpretation and education services goals for the agency's Mission Statement
 - Use the goals to document the agency's operational definition of interpretation and education services
- Establish goals for interpretation and education services from Mission Statement or infer from above requirements
- Link the agency definition to the corporate plan or strategic framework and set some broad operating goals for interpretation and education services including their relationship to other environment and heritage functions of the agency
 - Identify the business rules, business strategy and operating parameters of the agency
 - Assess the opportunities, constraints and approaches that these rules, strategy and operating parameters provide for the delivery of interpretation and education services by the agency
 - Use a customer classification framework to distinguish primary and secondary customers as end users of interpretation and education services

Legend

All projects should include these

Larger projects should also include these

**BEST PRACTICE in
DEVELOPING
Interpretation and Education Services**

- Ensure a planning process is in place which is able to translate broad interpretation and education services goals into tangible operational objectives that are related to organisational goals
- Identify and analyse the priority needs of both primary and secondary customers
- Formulate the specific messages which are to be communicated to identified audiences
- Establish performance standards for all interpretation and education services including delivery involving contracted providers and other external parties
- Identify the principal feedback mechanisms to be applied in service delivery monitoring
- Ensure data /information/knowledge collection systems are in place to gather key planning information to inform interpretation and education product and message development
- Develop criteria to determine which interpretation and education services are to be delivered to customers without charge, as fee for service or on a mixed revenue source basis
- Consider the park asset and visitor health and safety risk management issues involved
 - Specify interrelationships between the purposes of interpretation and education delivery and other agency services or products including points of complementarity, overlap, conflict and similarity in operational objectives and the design of delivery modes, especially other forms of external communication
 - Use a market segmentation tool to help more clearly identify audiences, the key messages and methods of delivery
 - Scope the feasible options and methods available to the agency to deliver interpretation and education
 - Establish communications systems for external stakeholders
 - Analyse the cost/benefit relationships of undertaking or refraining from interpretation and education services in specified locations
 - Consider the cost/benefit in terms of the customer, the environment and the ANZECC agency expressed in ecological, cultural, social, promotional and dollar values

Legend

- All projects should include these
 - Larger projects should also include these

BEST PRACTICE in DELIVERING Interpretation and Education

- Assign roles and responsibilities (establishing, implementing, monitoring and reporting), integrating these roles and responsibilities across all relevant organisational levels (National/State or Territory, Regional and/or Site)
- Ensure that relevant Corporate policies, and interpretation and education objectives, targets and programs are communicated to and understood by all providers (staff, contractors, volunteers, suppliers)
- Promote understanding of interpretation and education policies, objectives, targets and programs throughout the organisation and to relevant external suppliers and stakeholders
- Monitor day-to-day delivery to fine tune service delivery in response to feedback mechanisms
- Report back on performance (suitability, adequacy and effectiveness)
 - Ensure clear communication links between organisational functions (public affairs/relations, policy, planning, operations) and levels (Minister, Executive, Management, Regions and Sites)
 - Quantify service demands and provide adequate resourcing for delivery
 - Establish communications systems for external stakeholders
 - At the park and site level establish detailed local targets and other operational criteria for the attainment of corporate interpretation and education services performance standards
 - Establish selection processes and performance based service contracts for external contractors delivering interpretation and education services
 - Ensure year to date progressive expenditure and resource usage for interpretation and education services delivery is in line with milestone, target obligations and plans
 - Monitor impacts of interpretation and education services delivery and other agency service activities
 - Establish procedure to up-date policies and practices following any changes in Corporate policy, objectives and targets

Legend

All projects should include these

Larger projects should also include these

**BEST PRACTICE in
EVALUATING
Interpretation and Education**

- Ensure that Key Performance Standards and measures for interpretation and education services have been developed and Key Performance Indicators are set (see Developing stage)
- Verify that the Key Performance Indicator(s) identified address key corporate objectives and relate to the Key Performance Standards
- Monitor delivery to ensure that Corporate objectives and Key Performance Standards are achieved
- Relate delivery accountabilities to Corporate objectives in staff Performance Plans and provider agreements
- Assess the level to which the Key Performance Indicators have been achieved.
 - Develop audit instruments which enables agency to readily assess the effectiveness of its interpretation and education program performance
 - Establish day to day operational systems for capturing evaluation data without the need for additional collection methodologies whenever possible
 - Determine frequency of formal evaluation programs
 - Implement accreditation and validation and review arrangements to ensure that the scientific, cultural and philosophical content of I/E messages are accurate, consistent and up-to-date
 - Implement a program of establishing best practice benchmarks for agency interpretation and education delivery based on an identification of Critical Success Factors
 - Ensure year to date progressive expenditure and resource usage for interpretation and education services delivery is in line with milestone, target obligations and plans

Legend

All projects should include these

Larger projects should also include these

**BEST PRACTICE in
SUPPORTING
Interpretation and Education**

- Ensure an agency training plan is in place which enables staff delivering interpretation and education to be suitably skilled in appropriate work practices including evaluation
- Ensure appropriate training and orientation is provided to address Key Performance Standards for external contractors delivering interpretation and education services
- Ensure staff and new service providers to the agency are appropriately inducted and orientated regarding corporate interpretation and education policies
- Ensure all agency information and management reporting systems routinely collect, sort and distribute to all relevant personnel, the key data needed to plan, design, implement, monitor and evaluate interpretation and education performance.
- Establish procedure to up-date policies and practices following any changes in Corporate policy, objectives and targets

- Ensure finance systems and budget development processes can accurately commit to and progressively record expenditure for all interpretation and education activity in the agency
- Ensure staff performance appraisal and supervision/mentor arrangements are in place to support and monitor the effectiveness of interpretation and education delivery performance at a team and individual worker level.
- Ensure the design of interpretation and education related job specifications, work routines and team arrangements support field staff and encourage the transfer of interpretation and education skills, knowledge and practice wisdom between workers
- Provide opportunities for field staff in regional and local teams to input into the agency's Corporate policy from their perspective of on-the-ground service delivery actions

Legend

All projects should include these

Larger projects should also include these