

INTERPRETATION

# *Standards*

A PATHWAY TOWARDS  
EXCELLENCE



NATIONAL ASSOCIATION FOR  
**INTERPRETATION**

[www.interpnet.com](http://www.interpnet.com)

## ABOUT THE INTERPRETATION STANDARDS PROJECT

As part of the current strategic plan, the National Association for Interpretation commenced a full review of its national standards in 2016. Emily Jacobs (NAI Staff) and Todd Bridgewater (NAI Board) selected subject matter experts, via an open application process, to form a think tank called the Interpretive Standards Committee (ISC). NAI sought representation from multiple specialties within the profession, including academics, independent consultants, managers and planners. Once established, the committee developed an action plan comprised of four phases.

During Phase 1 (October 2016 – January 2017), the ISC considered the essential question of “What does a good interpreter need to know and do?” The committee addressed this question with respect to NAI’s current certification categories: Guide, Host, Trainer, Planner, Manager and Heritage Interpreter.

Phase 2 (January – July, 2017) gathered data by conducting interviews with thought leaders in the profession, member based focus groups, and collected job descriptions from NAI members across the United States. The ISC hosted fourteen focus group sessions, both online and in person, to determine what members/experts believed “good” interpretation looked like. Sessions focused on the same guiding question the ISC answered in Phase 1.

In Phase 3 (July 2017 – March, 2018), the committee coded data from Phase 2 and used it to draft an initial set of standards. These standards were then assigned to a category, such as interpretive planning, management, training, media, etc.

Phase 4 (March – October, 2018) presented the draft standards to members for comment. Members posted feedback via the standards website. At the end of the comment period, the committee incorporated member input, revised the draft standards using “one voice” and proofed for grammar.

The conclusion of all of this work is the document presented here. Over the next several years, NAI intends to use these standards with subject matter experts across the profession to update and modify our certification program. The process will begin in 2019 and continue over the next few years.

If you seek greater detail/questions regarding the process, please feel free to contact Emily Jacobs, Certification and Training Program Manager at NAI at [ejacobs@interpnet.com](mailto:ejacobs@interpnet.com).

### **On the Cover:**

Stone Arch Bridge,  
Minneapolis. Photo by  
Matthew Schillerberg,  
Trailheads Photography

## GENERAL INTERPRETATION

*These standards include knowledge, skills and abilities that pertain to a wide range of interpreters.*

### PROGRAM DEVELOPMENT

#### Skills/Abilities

- Develop interpretive programs.
- Conduct research to select content for interpretive program development.
- Design experiences based on objectives and outcomes of the client, such as scout, K-12 standards, and homeschool.
- Craft a theme for use as a basis for an interpretive experience.
- Write objectives or outcomes for interpretive events, exhibits, programs, and media.
- Create, obtain, or select the necessary props to strengthen a message to any given audience.

### INTERPRETIVE FOUNDATIONS

#### Knowledge

- Understand the purpose of interpretation including its definition, principles, and objectives.
- Know foundational texts and the evolution of interpretation.
- Know proven interpretive practices, techniques and concepts.
- Know the value of interpretation in educating diverse audiences.
- Understand the different purpose between formal and informal interpretation.

#### Skills/Abilities

- Possess knowledge of interpretive research resources and current trends discussed in interpretive literature.
- Develop thematic programs and products.
- Articulate the value of interpretation to any audience.



## KNOWLEDGE OF SELF

### Knowledge

Possess a strong awareness of self including personality, knowledge, strengths, weaknesses, prejudices, convictions, and personal history.

### Skills/Abilities

Be creative and open to trying something new.

Adapt to various situations with flexibility.

Demonstrate a commitment to professional and personal growth along with a focus on professional development goals.

Identify training needs for self.

Prioritize tasks according to importance.

Admit when you don't know something and be willing to find the answer.

Be self aware, empathetic, and vulnerable with visitors during interpretive experience.

Perform self-assessments to determine what to build on and how to improve.

Demonstrate leadership and professionalism in appearance, attendance, demeanor, and representation of the organization.

Exhibit commitment through enthusiasm and passion for a site's mission, vision, and values.

Accept constructive feedback and guidance.

Approach interpretive situations using problem solving and creative thinking skills.

## KNOWLEDGE OF SITE

### Knowledge

Know the mission, strategic plan, and objectives of the site being interpreted.

Possess knowledge of the site and/or topics relevant to site.

### Skills/Abilities

Create personal connections with the site yourself and relate to and engage with visitors with that knowledge.

## KNOWLEDGE OF VISITOR

### Knowledge

Know the different program types used to engage audience members.

Recognize that visitors bring their own cultural values and experiences to the site.

Know how that visitors learn in different ways.

Know current social science research such as attracting new and underserved audiences.

### Skills/Abilities

Develop engaging programs that focus on visitor interests, needs, or preferences.

Gauge when a visitor is open to having an interaction or conversation and when they are not.

Understand visitors have varying needs and know how to accommodate them.

## SOCIAL CONSTRUCTION

### Knowledge

Facilitate experiential, interactive, and audience co-created interpretation.

Foster social experiences and interaction among visitors and with the interpreter.

Co-create interpretive experiences with visitors and guests.

Listen to and let the visitor demonstrate his/her knowledge of the resource during the interpretive experience.

Incorporate constructive disagreement over contentious subjects into an interpretive experience.

Facilitate visitors' exploration of the resource and the development of connections for themselves.

## INTERPRETIVE TECHNIQUES

### Knowledge

Understand that visitors are looking for orientation, information, and/or interpretation.

### Skills/Abilities

Demonstrate the ability to perform a variety of formal interpretive programming techniques to audiences.

Demonstrates the ability to perform a variety of informal interpretive techniques.

Demonstrate the ability to provide a welcoming and safe environment for visitors and/or staff.

Utilize public speaking techniques to effectively express ideas and concepts to a wide range of audiences.

Deliver accurate and captivating programming relevant to and about the site.

Tell an engaging and effective story and/or narrative.

Create a mission-relevant or site-relevant story and/or narrative with little to no time for preparation.

Tell a personalized and engaging story or narrative that is relevant to listener.

Integrate dialogic techniques into interpretive experiences.

Manage group dynamics within an interpretive experience.

Utilize multisensory techniques to accommodate different ways visitors learn.

Field questions on controversial issues.

Navigate through what may be difficult controversial conversations.

Demonstrate listening skills.

Possess open body language that is welcoming to guests and invites conversation or questions.

Use entertainment to promote an interpretive experience.

Possess skill in operating and maintaining audio-visual equipment.

## EVALUATION

### Knowledge

Know evaluation methods used to plan, organize, manage, and assess interpretation.

Know how to evaluate an audience including surveys, focus groups, and other tools.

### Skills/Abilities

Evaluate interpretive programming in relation to short- and long-range plans.

Evaluate overall interpretive program effectiveness and quality.

Conduct performance reviews for employees and volunteers.

Assess peer performance in interpretation.

Evaluate completed projects to determine success.

Evaluate the most appropriate interpretive media.

Conduct visitor research using a variety of social science methods.

## INTERPRETIVE SUPPORT

### Knowledge

Know how to provide quality customer service.

Understand how history and current events impact site development, resources, and operations.

### Skills/Abilities

Perform basic office and clerical skills that support interpretive activities.

Perform administrative and logistical tasks that support interpretive efforts at the site.

Demonstrate quality customer service skills.

Be aware of guest opportunities and services in nearby locales.

Plan events that meet the needs of the hosting agency with whom they are partnering or employed.

Cultivate visitor appreciation through interpretive techniques and events that tie in with philanthropic giving and donations.

Identify and recommend retail items related to site themes and resources.

Assist with onsite retail operations.

Highlight programs, products, and materials that promote the site and encourage further exploration.

## INTERPRETIVE MEDIA

*These standards pertain to exhibit design, interpretive writing, editing and digital media.*

### KNOWLEDGE

- Know the advantages and limitations of different media.
- Understand the process of producing media.
- Know how to choose appropriate media.
- Know how people interact with different types of media.
- Know the principles of design for interpretive messages.
- Know how graphic arts, design, and photography communicate or express interpretive messages.
- Understand attention theory.
- Know editorial skills including grammar, spelling, and editing to produce written materials such as curricula, articles, or newsletters.
- Understand how to use current and relevant desktop publishing software.
- Understand the creation process for interpretive videos, including script writing, storyboarding, editing, software, and production.
- Know how to use effective interpretive writing for clear, concise, and engaging messages written for specific platforms.
- Know how to create a brief for a graphic design product to be given to a graphic designer.
- Understand how to design, develop, and post interpretive social media.
- Know the requirements of the Americans with Disabilities Act and universal design.
- Know copyright and intellectual property laws, including plagiarism.

### SKILLS/ABILITIES

- Create, develop, and produce interpretive publications for a target audience.
- Implement new media types to embrace and engage an audience.
- Drive a meaningful experience through knowledge of social psychology, including visitor studies, use patterns, and behavior analysis.
- Demonstrate effective writing skills across styles in different ways, techniques, and purposes.
- Develop interpretive media, including brochures, signage, and websites.
- Conceptualize, design, develop, and construct interpretive exhibits for a target audience.
- Utilize digital image technology.
- Write and design interpretive materials based on an organization's style guide or branding standards.
- Apply the requirements of the Americans with Disabilities Act and universal design in interpretive media.
- Demonstrate successful social marketing.
- Explain a graphic design in a clear and concise way to non-designers.



## INTERPRETIVE MANAGEMENT

*These standards emphasize supervision, human resources, communication, advocacy, partnerships, mentorships and volunteer management.*

### KNOWLEDGE

Possess knowledge of project management tools.

Know the difference between leadership and management and how to utilize both.

Understand organizational structure.

Understand how to facilitate and convene effective meetings.

Understand the skills needed to succeed and recognize areas for staff improvement.

Understand planning models and the benefits of each.

Understand when to lead and when to manage.

Know professional organizations and what training is available.



## SKILLS/ABILITIES

Develop and deliver outreach materials that align with the marketing and/or messaging plan of the organization.

Demonstrate ability to market programs and site.

Effectively execute all tasks pertaining to media relations for site.

Demonstrate budget and fiscal responsibility.

Manage program development and strategically coordinate implementation that demonstrates maximum utilization of resources.

Develop strategic plans and procedures to ensure interpretation and education efforts are aligned with the organizational mission.

Take appropriate measures to protect visitors, personnel, and the organization from risk and loss.

Develop and maintain a crisis management plan.

Advocate organizational support for interpretation practices.

Maximize programming to develop public support and resource stewardship.

Use logic models to communicate program objectives.

Respond respectfully to the needs and feelings of different people in different situations.

Demonstrate tact and diplomacy during conflict.

Align volunteer culture with organizational values.

Advocate for the value of volunteering.

Utilize feedback for improvement.

Demonstrate confidence in designated role.

Inspire and motivate others to accomplish goals.

Demonstrate an ability to learn from others.

Establish and maintain the respect of others.

Initiate and manage change.

Manage project timelines and priorities.

Model best practices to serve as an example for others.

Improve skills, seek training opportunities, and set personal and professional goals with the help of a mentor.

Network with other professionals and be involved in professional organizations.

Raise funds to support the mission of the organization.

Advocate for public support to fund interpretation.

Demonstrate operational management skills, including writing policies, procedures, reports, and/or coordinating all aspects of operations.

Demonstrate awareness of laws and policies governing personal job duties and the administration of the site.

Demonstrate awareness of board structure, culture, and authority.

Schedule staff in an efficient and timely manner.

Manage time, resources, and personnel to ensure completed work.

Communicate concepts to internal audiences in an effective manner.

Incorporate support and promotion of diversity in management practices.

Evaluate all factors that impact resource sustainability.

Facilitate and convene effective meetings.

Manage conflict to a successful resolution.

Exercise sound judgment and take appropriate initiative to resolve a crisis.

Develop and maintain partnerships with internal and external stakeholders.

Communicate concepts to external audiences in an effective manner.

Collaborate with others.

Recruit and hire a diverse staff in accordance with federal, state, and local regulations.

Demonstrate knowledge of coaching practices.

Coach staff in the development and delivery of interpretive programming.

Coordinate and supervise volunteers in assigned areas of work.

Manage volunteer program logistics including recruitment, orientation, training, evaluation, and recognition.

Support professional development opportunities with resources.

Build a formal internship program.

Serve as a mentor to help others improve.

Write job descriptions.

## INTERPRETIVE PLANNING

*These standards incorporate social science in the development of interpretive plans and desired visitor experiences.*

### KNOWLEDGE

Understand management goals, expectations, and constraints.

Understand planning models and theories.

### SKILLS/ABILITIES

Lead planning sessions with a diverse set of participants and stakeholders including those from underserved and non-traditional groups.

Facilitate overall site planning including non-personal media and personal programming based on stakeholder input.

Facilitate the identification and selection of interpretive media.

Explain the value of an interpretive plan and planning within an organization.

Guide participants to create practical, achievable, and realistic plans.

Inventory site resources including equipment, heritage assets, and visitor experience products.

Attend and respond to the needs of the client.

Ensure that planning processes and interpretive plans are kept up-to-date with strategies for accountability and implementation.

Read and analyze plans which affect site such as determining standards and making continuous improvement.

Understand interpretive planning principles and techniques including co-curation, development and implementation of goals, objectives, themes, media prescriptions, monitoring strategies, evaluations, and community collaboration.

Champion the value of interpretive plans and planning within one's organization.

Use market research to develop visitor experience products that meet audience needs and interests.



Identify, establish and maintain effective working relationships with stakeholders including agencies, the media, and the community.

Maintain effective working

relationships with associates, clients, guests, and the public.

Build and nurture relationships across the organization to maximize cross-departmental collaboration and understanding.

Coordinate department to ensure successful operations.

Facilitate the interpretive planning process with internal and external stakeholders.

Work with stakeholders to articulate a vision for the potential visitor experience.

Communicate plans and planning processes to all levels including staff, supervisors, and stakeholders.

Serve as primary liaison for site by working with outside experts and promoting collaborative planning events which encourage support and visibility for the site.

## INTERPRETIVE TRAINING

*These standards speak to an interpreter's ability to facilitate and utilize adult learning principles, lesson planning and various teaching techniques when instructing others.*

### KNOWLEDGE

- Know learner-centered training strategies.
- Know different teaching styles such as lecture, group work, and think-pair-share.
- Know learning theories that pertain to adults and children.
- Understand communication theory and its application to interpretation.
- Know how to keep the attention of a group and group dynamics.
- Know the differences between training and facilitation techniques.
- Understand constructivism theory and its application to interpretation.
- Know educational resources that support interpreters or the interpretive operation, such as NGSS Standards, Project WILD/WET, and/or Citizen Science.
- Understand NAI certification programs and how to guide interpreters through the process of each certification.

### SKILLS/ABILITIES

- Train staff and/or volunteers in interpretation.
- Utilize the principles of how people learn to ensure effective training.
- Assess trainee comprehension in a variety of ways.
- Utilize a multi-sensory approach to training.
- Train staff and volunteers to implement job duties that support the interpretive operation (i.e. gift shop, ticket sales, welcome desk, etc.)
- Provide relevant examples to trainees.
- Be able to challenge trainee assumptions.
- Model good interpretive techniques in training while teaching a topic.
- Utilize a variety of training techniques.
- Make training sessions learner-centered.
- Demonstrate training and facilitation techniques as separate skills.
- Create training agenda, lesson plans, and training materials.
- Manage training mechanics and logics.
- Manage trainee behavior.
- Share additional resources to build upon established training curriculum.



## OTHER

*These additional standards surfaced within the data and apply to specific positions, such as animal husbandry, living history and curation.*

Know how to provide care and husbandry for program animals.

Conduct care and husbandry for program animals.

Work with live animals during presentations.

Curate artifacts, props, and reproduction items used for site programs and products.

Conduct living history using first person techniques.

Conduct living history using third person techniques.

Know how local and regional communities function and can work with the site/resources.



**THANK YOU** to the Interpretation Standards Committee members who were vital to the success of this project:

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