The Interpreters Training Manual
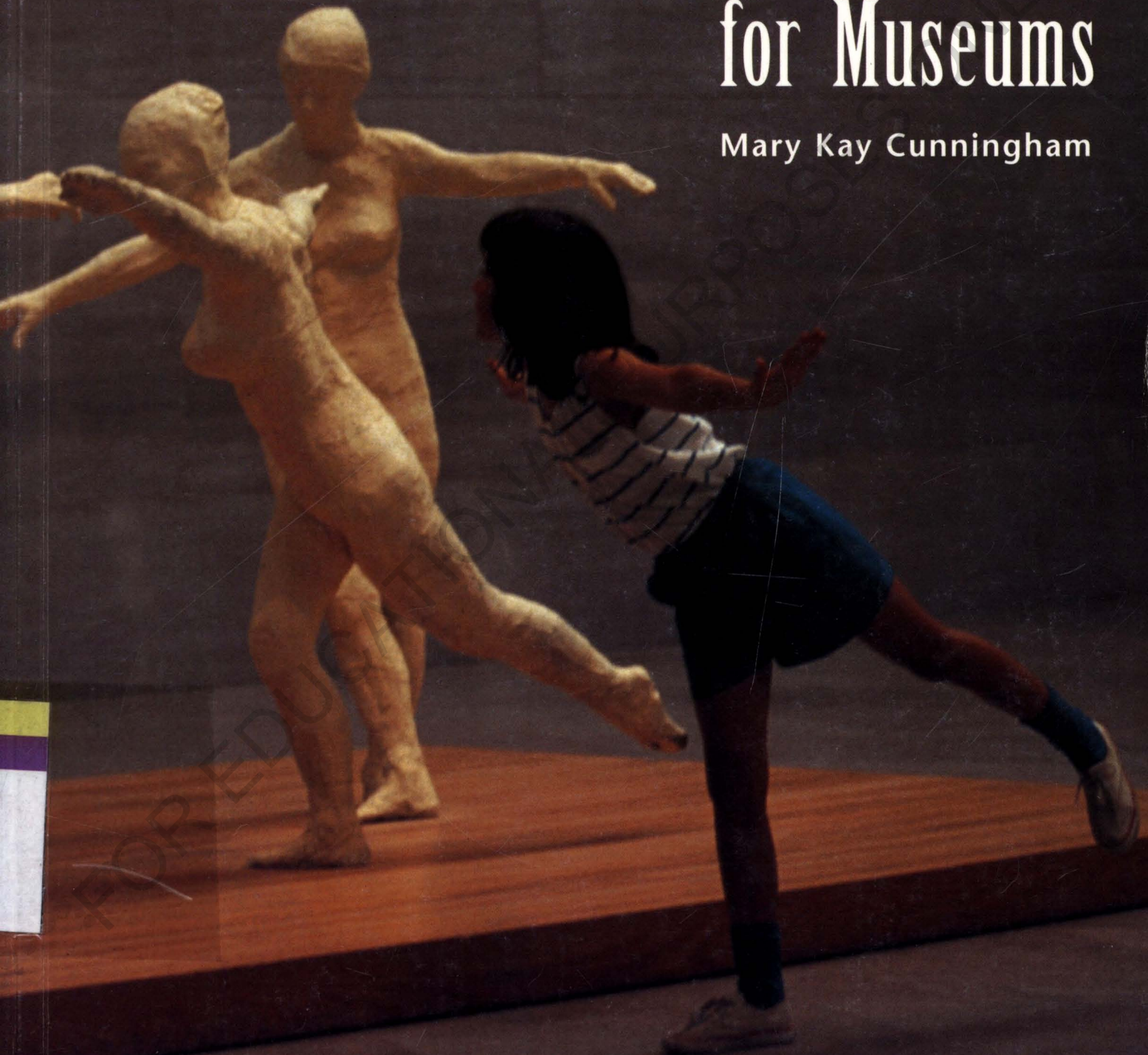## for Museums

Mary Kay Cunningham

The Interpreters Training Manual for Museums

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AMERICAN ASSOCIATION OF MUSEUMS

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On the cover: Young girl and *The Dancers* by George Segal. National Gallery of Art, Gallery Archives. © Dennis Brack/Black Star.

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If education is about the negotiation of meaning and museums are a forum for that, then our definitions of the institution must begin to allow, first, for variation in meaning and, second, for interaction between presenters and participants.

Lisa Roberts • From Knowledge to Narrative: Education and the Changing Museum (1997)

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I had no idea what I was getting myself into when I accepted a position with Lisa Roberts in the public programs department of the Chicago Botanic Garden in 1994. From day one, I was encouraged to think about "what makes a meaningful visitor experience" and "how to maximize the learning narrative between interpreters and visitors." Ten years later it isn't hard to see how I became inspired to pursue strategies for training interpreters to facilitate these meaningful experiences. I would like to thank Lisa and others who have served as professional mentors, collaborators, reviewers, and friends as I have pursued this work, including Stephanie Weaver, Tracy McClendon, Cheryl Main, Tina Nolan, Doug Widener, Melanie Napoleon, Nicole Royal, Erik Holland, Dave Bucy, Zina Castanuela, Barbara Butler, Stephen Bell, John Buranosky, Lisa Abia-Smith, Wendy Abelmann, and Tania Hyatt-Evenson.

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Mary Kay Cunningham
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Truth is not in the conclusions so much as in the process of conversation itself.

Parker Palmer • "Good Teaching: A Matter of Living the Mystery" (1990)

Introduction

More than 12,000 parks, museums, camps, zoos, gardens, and other educational sites in the United States have interpreters (Knudson, Cable, and Beck, 1995)—i.e., individuals who serve in a front-line role and facilitate positive and educational visitor experiences. In fact, estimates provided by the American Association for Museum Volunteers and the Association for Volunteer Administration indicate that almost 500,000 volunteers and docents serve in such a capacity at museums and similar sites.

However, despite the growing number of professional interpreters, as well as research that suggests that more than 90 percent of museums are offering docent training (Sachatello-Sawyer, et al., 2002), the literature dedicated to *helping* museums develop interpreter training is limited. Published works that elaborate on the virtues of interpretation's philosophy and methodology often lack the concise and practical learning tools sought by novice trainers and interpreters. Furthermore, my personal observations and research tell me that museum training programs tend to teach facts about sites or collections rather than explore the interpretive techniques that encourage visitors to actively engage in learning.

Over the years, I have talked with museum colleagues who have lamented the lack of support materials for training interpreters. How do we train our interpreters, they've asked, to facilitate personalized interactions that enhance the visitor experience? *The Interpreters Training Manual for Museums* is both a response to and product of those conversations. It is a comprehensive resource that shows both staff and volunteer interpreters how to engage visitors in a meaningful, message-based dialogue. Suitable for all types of museums—including botanical gardens, zoos, parks, and living history sites—this book establishes a practical and easy-to-follow framework for interpreter training through the use of group exercises, written and oral activities, interactive lectures, presentation tools, and opportunities to practice learned skills. Its goal is to help museum staff develop a progressive training program that references current educational learning theory and museum studies while modeling conversational interactions between museum visitor and interpreter. By enhancing and personalizing the experience for visitors, museums are more likely to maintain the ongoing public support they need to survive.

AN EVOLVING DEFINITION

In some circles, interpretation is considered a relatively new profession. Over time, it has moved from lecture-based *presentation* toward an interactive *exchange* of ideas between visitors and interpreters. Two publications, *Adventures of a Nature Guide and Essays in Interpretation* by Enos Mills (1920) and *Interpreting Our Heritage* by Freeman Tilden (1957) generally are recognized as the foundation of the field. Inspired by a close relationship with naturalist John Muir and a strong connection to the natural world, Mills saw the interpreter as someone "who can guide others to the secrets of nature." He wrote: "It is not necessary for a guide to be a walking encyclopedia. He arouses interest by dealing in big principles—not with detached and colorless information." Tilden built on this idea, defining interpretation as "an educational activity, which aims to reveal meanings and relationships through the use of original objects, by firsthand experience, and by illustrative media rather than simply to communicate factual information."

Today, however, uncertainty still surrounds the definition and application of interpretation at many institutions. Although relevant to all museums, Tilden's work is regularly referenced in environmental interpretation settings (e.g., parks, nature centers, natural areas), while more traditional museum settings (art and history institutions) are less likely to apply these time-tested lessons. As the needs of visitors and all museums (those with living collections and those without) evolve and expand, so, too, will the definition of interpretation. At a minimum, visitor studies suggest that interpretation should promote social interaction in an effort to personalize and enhance the museum visitor's learning experience. Engaging visitors in a meaningful dialogue encourages them to participate in their own learning and to develop deeper connections to the institution.

CONVERSATION AS INTERPRETATION

The idea of incorporating dialogue into educational practice is not new. Inquiry-based learning and the educational theories of constructivism, cooperative learning, and experience-based learning all advocate using dialogue in education. Constructivism serves as a foundation for message-based conversations because it emphasizes tapping the learner's previous knowledge to increase the effectiveness of the lesson. As suggested by the very word "constructivism," conversational interpreters are trained to help visitors rediscover what they already know about a subject and then *build* upon that foundation with new knowledge and experiences. "For museums," George Hein noted in his 1995 article, "The Constructivist Museum," "this translates into the dictum that we need to focus on the visitor, not the content of the museum."

In an essay titled "Elegant Programs and Conversations" in *Presence of Mind: Museums and the Spirit of Learning* (1999), Michael Spock cites several qualities that make personal interactions in museums meaningful:

They are mediated by people—live people. In contrast to the impersonal, fixed exhibit medium, programs and conversations derive their strength, flexibility, and connectedness from being human exercises. . . . Rather than being passive receptacles, the visitor contributes to, constructs, and helps create the visitor experience. . . . There is the assumption that the visitor or companion is not some poor soul in need of enlightenment, but a smart and capable collaborator. So it isn't that visitors are expected to work for their insights, but that they might actually have something to contribute to the exchange.

Building on these and other ideas, this manual focuses on showing interpreters how to improve and personalize the experience for their audiences and more effectively connect visitors to the museum's messages. The interpreters, collections, and messages may vary from site to site, but the elements and techniques of effective interpretation are universal.

Several objectives guided the development of this training manual. To be complete, *The Interpreters Training Manual for Museums* would need to:

1. offer a substantial and practical collection of resources and ideas for training interpreters

2. provide user-friendly tools and methods to help staff prepare and deliver interpretive training

3. offer information that appeals and applies to a variety of museums—those with living collections (e.g., botanic gardens, parks, zoos, aquariums) and those with non-living collections (e.g., art, history, natural history, science and technology)

4. reinforce the value of conversation and engaging visitors in a dialogue by providing sufficient background information on interpretation and related learning theory

5. offer the option of further investigation through additional resources (listed at the end of the book)

To that end, *The Interpreters Training Manual for Museums* adapts training materials from a variety of sources and disciplines, including communications and visitor studies, to show all professional staff, regardless of their interpretive expertise, how to offer a convenient, site-specific, and cost-effective training for interpreters. The book creates goals and expectations for the staff who will train full-time and volunteer interpreters; provides teaching outlines and exercises for implementing the training and evaluating trainees; and lists resources for enhancing and customizing interpretive training.

According to Ron Zimmerman, a professor at University of Wisconsin at Stevens Point— one of the few large U.S. universities with courses targeted at training interpreters—most interpreters working today don't have the benefit of formal training and rely on self-education and self-training (Zimmerman, 1999). Such a lack of formal training not only

jeopardizes the credibility of the profession, but also prevents visitors from fully connecting with cultural, scientific, and natural sites (Veverka, 1998). As Senegalese naturalist Baba Dioum once said, "In the end, we protect only what we love, we love only what we understand, we understand only what we are taught." If we do not adequately train our interpreters to be effective educators, how can we expect them to teach visitors to love and respect our collections?

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Zimmerman, Ron. 1999. Professor of interpretation, University of Wisconsin, Stevens Point; co-author of *The Interpreter's Guidebook*. Phone interview, March 20, Evanston, Ill.

How to Use This Manual

The Interpreters Training Manual for Museums is the result of comprehensive research and many years of experience in creating interpreter-training programs. A new approach to training interpreters, the book incorporates current learning theory and visitor studies that suggest that interaction and conversation are ideal ways to engage museum visitors in learning. The training materials were designed to adapt to the site-specific needs of all types of museums and make the task of training interpreters easier and more effective.

PREPARING FOR THE TRAINING

The first part of the manual creates goals and expectations for the training; serves as a checklist for the staff who will train full-time and volunteer interpreters; and enables those trainers to customize materials to meet the specific needs of their museums. Chapters 1 through 4 identify a series of tasks that must be completed by the trainer for the manual's goals to be met.

This section also addresses the preliminary phases of planning that can help an institution understand its mission, determine how it wants to define interpretation, and clarify the role of the interpreter in accomplishing its goals. Interpreter training cannot succeed unless the institution understands its current and target audience, which programs are effective, and the kinds of resources that will enhance the training. As with all good planning, if these early considerations are not addressed, subsequent pieces of the training will not be effective. Logistics also play a key role in creating a successful training program, and each chapter concludes with a set of forms—worksheets, sample documents, and other resources to help with this and all planning tasks. Some of these forms can be used as handouts for trainees (see chapter 20). Each form is labeled with a number, which references the chapter, and a *letter;* which indicates the form's placement at the end of the chapter. For example, worksheet 1A is the first form in chapter 1.

- **Worksheets** help the staff person (the trainer) and the interpreters (the trainees) consider and record useful information. They also serve as writing exercises that can help trainees process or apply various concepts.
- **Sample Documents** offer examples of recommended tools, such as job descriptions, evaluations, themes, and messages, and show how a concept or technique should be applied. Each trainer should adapt the content to best fit her institution.

THE TRAINING MODULES

The book includes three modules for interpretive training. Module 1 (chapters 5 to 10) provides trainees with an overview of interpretation and the factors that influence its effectiveness. Module 2 (chapters 11 to 14) clarifies how to engage visitors in site-specific interpretive conversations and structured programs. Module 3 (chapters 15 to 17) helps trainees create their own interpretive programs, integrating the lessons learned in the first two modules.

Dividing the training into three progressive modules allows organizations to adapt to the skill level and previous experiences of the interpreter trainees. This chart offers suggestions for how modules might be used with various groups of trainees.

Audience for Training	Module 1	Module 2	Module 3
Professional Interpreters	Highly relevant	Highly relevant	Relevant
Volunteer Interpreters	Highly relevant	Relevant	Moderately relevant
General Site Staff/Volunteers	Relevant	Moderately relevant	Not relevant

For instance, a full-time paid interpreter responsible for creating new programs should participate in Modules 1 through 3. But the first two modules would provide sufficient training for volunteer interpreters, who may not be in a position to create programs. Finally, staff and volunteers who interact with the public, such as those working in guest services, concessions, or security, will benefit from Module 1. This three-module structure helps staff members interact with the visitor in their specific roles and has been tested to ensure the greatest degree of effectiveness with each level of interpreter. Each trainer is encouraged to adapt and/or selectively use the book's materials to meet the specific needs of her institution.

TRAINING MANUAL FORMAT

In addition to training resources such as worksheets and sample documents, the training modules also provide overheads, exercises, and teaching outlines.

- **Overheads** provide a focal point and help the trainer supplement verbal instruction and dialogue. (The forms in this book can be photocopied onto overhead transparencies.)

- **Exercises** give trainees an opportunity to practice their skills among peers and encourage an open forum with an emphasis on dialogue. A list of required materials, props, or volunteer assistance precedes each exercise.

- **Training outlines** guide the trainer, step-by-step, through the training process, and tell the trainer when to use questions to facilitate discussion or the overheads, exercises, and worksheets to reinforce a concept.

Each module begins with a training outline, which includes a system of symbols to guide the trainer. For example, the symbol **( )** indicates when a training exercise should occur. An 👁 indicates that there is an overhead that reinforces the lesson concept. A 🖉 references a worksheet that can help trainees process ideas or techniques. In addition, questions that the trainer should ask the group are written in *italicized* text to emphasize the importance of group interaction.

Each module also includes a series of short, accessible chapters, which have been designed to provide enough background information to adequately inform trainers without overwhelming them.

THE TOOLS OF INTERPRETATION

The final section of the manual lists resources—publications, organizations, Web sites, and professional networks—with information on support for training programs and interpretive efforts in general. These materials may provide valuable new perspectives and ideas for interpretation. This section also includes a glossary, a list of sample handouts that trainers can photocopy for trainees, and an index of all the training tools for quick reference.

CHAPTER 1 • # Lay the Foundation: Establishing Your Interpretive Framework

Understanding the museum's mission and the role of interpretation in fulfilling that mission is the foundation of successful interpretive training. With that goal in mind, each trainer should complete these four tasks before the training begins:

1) REINFORCE OR DEFINE THE MUSEUM'S MISSION

A strong mission statement is a central part of a successful interpretive program. If a mission does not exist or needs to be redefined, the institution's leadership—in collaboration with staff and community members—must work to resolve the issue. Redefining or creating a mission statement involves two lines of questioning:

1. Who/what do we *think* we are? Who/what are we *in fact*? Who/what do we *want* to be?

2. Where do we *think* we are going? Where are we going in *fact*? Where do we *want* to go?

Answering these questions will help determine the institution's identity and direction—two vital components of a mission statement. It is important to define clearly the mission so that it can inform the interpretation process. Ideally, the mission will highlight the value of providing an engaging or interactive learning environment for visitors when it addresses what the museum does, as well as why and how it does it. Similarly, interpretation should reinforce the mission statement through interpretive planning and training programs. The mission creates expectations for both its staff and visitors. Given that most museums exist to serve their visitors in some capacity, the mission should outline the tone of the desired experience. Worksheet 1A contains an example and ideas for writing or refining a mission statement.

For guidance on creating or revising a mission statement, see *Museum Mission Statements: Building a Distinct Identity* (AAM, 2000) and the AAM Accreditation Commission's

Expectations Regarding Institutional Mission Statements, available at www.aam-us.org/programs/accreditation/mission.cfm.

2) DEFINE INTERPRETATION FOR YOUR SITE

A museum's definition of interpretation should reflect its unique character and institutional objectives (as stated in the mission). This definition will determine the tone and focus of all interpretive training and programs. While interpretation has its roots in the natural world, it can be applied to any setting. The following are some commonly referenced definitions of interpretation.

A nature guide (interpreter) is a naturalist who can guide others to the secrets of nature. It is not necessary for them to be a walking encyclopedia. They arouse interest by dealing in big principles, not with detached and colorless information.
Enos Mills, *Adventures of a Nature Guide*, 1920

[Interpretation is an] educational activity which aims to reveal meanings and relationships through the use of original objects by first hand experience and illustrated media rather than simply to communicate factual information.
Freeman Tilden, *Interpreting Our Heritage*, 1957

Environmental Interpretation involves translating the technical language of a natural science or related field into terms and ideas that people who aren't scientists can understand.
Sam Ham, *Environmental Interpretation*, 1992

Interpretation is the process of making something understandable or of giving something a special meaning.
Gary Edson and David Dean, *Handbook for Museums*, 1994

Interpretation facilitates a connection between the interests of the visitor and the meanings of the resource.
National Park Service, 1996

Interpretation is the activities through which a museum carries out its mission and educational role; it is a dynamic communication between the museum and the audience; it is the means by which the museum delivers its content. Interpretive media/activities include, but are not limited to, exhibits, tours, Web sites, classes, school programs, publications, outreach.
AAM's National Interpretation Project, 1999

Interpretation is a communication process that forges emotional and intellectual connections between the interests of an audience and the inherent meanings in the resource.
National Association for Interpretation, 2000

The definitions created by the National Park Service and the National Association of Interpretation (NAI) have been embraced by many interpretive professionals because they