

What Have We Got And Is It Any Good?

**A practical guide on how to survey
and assess heritage interpretation**

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Index

1. How to use this Manual	Page 3
2. Introduction and Background	Page 4
3. Survey Aims	Page 5
4. Key Assumptions	Page 5
5. Preparing for a Survey	Page 7
6. How to Produce an Inventory	Page 9
7. How to Undertake a Quality Assessment	Page 12
8. Notes on Coding	Page 18
9. Training the Surveyors	Page 19
10. Setting up a Database	Page 20
11. Analysing and Interpreting the Data	Page 20
Appendix 1: Survey questionnaires and coding notes	Page 23
Appendix 2: Measuring readability and reading age <i>The SMOG test and Fry test</i>	Page 28

1. How to use this manual

This manual has been produced as a practical guide on how to produce an inventory of interpretation and assess its quality. It is based on a methodology developed by the Highland Interpretive Strategy Project.

- The **introductory** sections describe the background to the survey and explain some of the thinking behind the methodology.
- The **methodology** sections explain how the survey should be carried out.
- The sections on **analysing** and **interpreting** the data provide guidance on how to set up a database and how you might subsequently use the information.
- Examples of the four **survey questionnaires** and the **data coding** system are given in the appendix.
- The accompanying **computer disk** contains the text of the manual and the questionnaires in MS Word 6/97. This will allow you to copy the questionnaires for use on your own site or area, subject to the following proviso:

The manual and the methodology it describes may be freely used and copied, so long its origins are credited with reference to both this publication and the Highland Interpretive Strategy Project.

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2. Introduction and background

The interpretation survey methodology described in this manual was developed by the Highland Interpretive Strategy Project. It has two components – the production of an **inventory** of existing interpretation; and an assessment of its interpretive **quality**. This introductory section describes the background to the survey and explains how it is being used in the Scottish Highlands.

2.1 The Highland Interpretive Strategy Project

The Highland Interpretive Strategy Project (HISP) is a partnership project that aims to promote better interpretation in the Highlands of Scotland. The project covers the Highland Council area, and has been sub-divided into 8 local areas based on the former District Councils. Each local area partnership has produced an *Area Framework for Interpretation*, with a strategic overview provided by the *Highland Interpretive Strategy*.

The *Area Frameworks for Interpretation* (AFIs) are designed to:

- Identify the main interpretive theme/s for each area.
- Identify gaps in provision.
- Help relevant agencies determine grant aid on the basis of a planned and structured approach to interpretation.
- Provide guidance to these agencies with respect to proposed new developments.
- Promote more effective linkages between individual attractions and sites.
- Link with other relevant policy documents (Local Plans, Tourism Action Plans etc).
- Promote interpretive planning and community involvement in the future development of interpretation.

Each AFI is based on a comprehensive inventory of the existing interpretation. As an inventory had not been produced at such a scale before, it was necessary to develop a new survey methodology that could be carried out within a tight budget and timescale.

The Project is also keen to address quality standard issues, and to identify appropriate actions to improve standards of interpretation throughout the Highlands. In particular, the Project partners wish to test how much of the existing ‘interpretation’ is truly interpretive in its approach, rather than simply communicating visitor information.

A survey methodology was thus developed, piloted and carried out in the summer of 1998. The results were transferred to a database and the findings analysed to inform the content of the AFIs.

With clear evidence of the prevailing coverage and standards of the interpretation, key partners are now adopting the *Area Frameworks for Interpretation* into their policies. For example, the Local Enterprise Companies are incorporating the AFIs into their area strategies - the first time such a structured approach to the development of interpretation

has been pursued by economic development agencies in Scotland. The Highlands of Scotland Tourist Board is also incorporating the AFIs into their Tourism Action Plan.

3. Survey Aims

The aims of the survey are twofold:

1. To produce a **simple but comprehensive inventory** of all current facilities, detailing what is being interpreted, where, how, and by whom. This information can be used on its own or in combination with other data (e.g. a heritage resource inventory) to determine future priorities.
2. To provide an **assessment of the prevailing quality** of interpretation. The resulting information can be used to benchmark quality standards, develop policies for improving standards, and raise awareness of the differences between good and bad interpretation.

It should be noted that the quality assessment is not designed to evaluate the specific effectiveness of any individual piece of interpretation, which is usually done in terms of the objectives for that interpretation. Rather, it provides an indication of the degree to which the interpretation meets accepted principles of good practice.

4. Key Assumptions

This section describes some of our background thinking in developing the methodology. An understanding of this will help you apply the survey in your area:

1. Interpretation is a highly varied process, and a survey capable of addressing every possible scenario would be unfeasibly complex (and expensive). We have therefore placed an emphasis on simplicity and practicality. Although the survey will cover the great majority of circumstances, there will be an occasional or unusual piece of interpretation for which it does not work.
2. Interpretation is as much an art as a science, and it cannot therefore be assessed against solely objective criteria. In our model, assessing the standard of interpretation requires qualitative judgements to be made about the degree to which the interpretation meets accepted principles of good practice. These judgements can be quantified and expressed on a quantitative basis. In order to minimise possible variations in the judgements made of the interpretation, the questions have been made as simple and clear as possible, and only a limited range of possible scores allowed for. However, a degree of subjectivity cannot be avoided in any such survey. One implication of this is the need for surveyors to be trained and to develop a common understanding of the survey methodology and scoring process. We make suggestions about this in section 5.1 below.

3. Interpretation is based on a range of media, some of which cannot be practicably or objectively assessed in terms of their quality, such as arts based media. A number of media are thus excluded from the quality assessment. Further details about these exclusions are given in section 7.1 below.
4. It is difficult to devise criteria that are objective enough to achieve reasonable consistency across a range of surveyors, and yet also allow for all the possibilities in successful interpretation. Thus, it is conceivable that a piece of text might not meet any of the 'accessibility' criteria, and yet still be effective as interpretation. Text quotations drawn from contemporary historical accounts would be an example of this. The survey should therefore be regarded as giving a general indication of quality, rather than as an absolute arbiter of whether something is worthwhile.
5. In devising the quality assessment, we have developed a range of criteria against which the interpretation is judged. These reflect accepted principles of good practice¹, but should not be seen as a prescriptive indication of what makes for good and bad interpretation. As stated above, interpretation is an art, and effective interpretation may sometimes meet very few of the criteria we suggest. However, in general terms, interpretation that meets the criteria proposed is more likely to be effective and to have been produced by those with a good understanding of what will make for a successful piece of interpretation.

¹ See Tilden, F. 1957. *Interpreting our Heritage*. The University of North Carolina Press; and Ham, S. 1992. *Environmental Interpretation: a practical guide for people with big ideas and small budgets*. North America Press. Colorado

5. Preparing for a Survey

5.1 Project planning

In preparing for a survey of this kind, there are a number of key questions and organisational issues you should address at the project planning stage.

The specific questions we suggest you should ask include:

Why do I need to do a survey?

There may be a number of reasons why you need to survey the interpretation in your area, possibly similar to those described in the section on the Highland Interpretive Strategy Project. However, if your requirements are different it may be appropriate to adapt the methodology to meet your particular circumstances. For example, you may only need to produce an inventory in order to identify gaps in provision, or you may only want a quality assessment in order to measure how good the existing provision is.

Other related questions that will help you define the need for and scope of a survey include:

- who will use the information produced by the survey?
- which organisations need to be involved? and
- what action is possible as a result?

What resources do I have?

The most significant constraint to any survey is the time and cost of data collection. It is therefore important to avoid gathering and processing unnecessary information. In designing the survey, we have restricted the data to that which is most relevant. However, you may wish to add to or delete survey questions depending on your objectives and resources.

The survey can also be applied at different levels of intensity (and therefore cost). For example, the quality assessment can be done either universally (i.e. survey everything) or on a sample basis (with the results extrapolated out). A sampling approach will be cheaper, but it may not give you enough data on which to base an argument for improving quality. The approach taken by the Highland Interpretive Strategy Project was to carry out a comprehensive quality assessment with every item of interpretation being assessed. It was felt that this would give the results a credibility that could not be challenged by otherwise potentially sceptical agencies.

What am I surveying?

There are two key issues to address here:

Firstly, you will need a list of all the relevant sites where interpretation is found. For practical purposes, the starting point will therefore be to pull together details of all relevant sites. We suggest this should include all private sector heritage attractions, but exclude other types of visitor attraction that have no heritage basis and are solely provided for

entertainment purposes (such as a leisure centre or fun park). You will need Ordnance Survey 1:25,000 maps of the area/s in question to identify grid references.

Secondly, you will need to consider what aspects of 'interpretation' are to be surveyed. There can be a very fine line between interpretation and visitor information; and it is unfortunately common for visitor information to masquerade as interpretation when it is not in the slightest 'interpretive' in its approach or execution. (Note: this is not to decry the importance of visitor information in telling visitors about what's on, where to go, opening times, admission charges etc).

To illustrate this point, you should consider whether the survey is to cover all outdoor panels, regardless of their purpose, or be restricted to 'interpretation' panels. At bathing beaches, for example, it is common for panels to be used to communicate information about water quality and public safety. Such panels are never intended to interpret the beach environment, and should be excluded from a survey of interpretation. Therefore, you will need to provide your surveyors with some guidance about what they should and should not survey.

Similarly, you will need to decide what publications to include in the survey. Many site leaflets combine promotional, information and interpretive purposes. Such leaflets should usually be included, but other site leaflets intended solely to provide orientation or promotion should be excluded. The danger of surveying everything is that the results will be skewed by the inclusion of media and facilities never intended to be interpretive.

Who will carry out the survey and data processing?

Because the quality assessment is based on quantifying judgements about certain qualities of the interpretation, it is important the surveyor/s have a basic understanding of interpretation. This does not mean they need to be professional interpreters, but that some training will be needed for those with limited experience of interpretation. In particular, it is important for surveyors to be made familiar with a range of examples of good and bad interpretation in order to 'anchor' in their minds the scoring scale used in the quality assessment.

There is also an issue of surveyor bias in undertaking the survey. The most consistent approach would be for one person to do the whole survey. However, if you have a wide geographical area to cover, or the survey needs to be done quickly, this may not be practicable. The HISP used 18 surveyors, who returned a reasonably consistent set of survey results as a result of a one-day training course that all surveyors were required to attend.

The individual/s designing and entering the data into a database should also be made familiar with the survey methodology and its underlying philosophy.

6. How to Produce an Inventory

This section explains how to produce an inventory of interpretation. We suggest you study the following with a copy of the survey questionnaires to hand (see **Appendix 1**).

6.1 The approach

The inventory will summarise relevant information about the interpretation, such as what media are being used, what topic/s are being interpreted, who is doing the interpretation, and so on.

This information is collected in three ways:

- Through a visit to each site and building where interpretation is found
- Through reviews of printed matter
- Through interviews with event organisers and facility managers

The inventory is based on two separate questionnaires – questionnaire 1 is for **individual** pieces of interpretation found **outdoors**, and questionnaire 2 is for **built facilities** (visitor centres, historic houses, museums etc). To simplify the questionnaires, and to aid data entry to the database, a coding system has been developed and open-ended questions minimised. The coding system is necessary to ensure consistent recording of media and topics, and to keep the information recorded on each questionnaire as simple as possible.

We suggest you print the two questionnaires on different coloured paper. The coding system should either be printed on the back of the questionnaires or on a separate laminated card.

The questionnaires are largely self-explanatory, but we provide below some guidance notes as an aid to their use. We suggest you study these notes with a copy of the questionnaires to hand:

6.2 Questionnaire 1: individual items of interpretation

Questionnaire 1 should be used to collect data about individual items of interpretation found outdoors. **One** form should be completed for **each** item of interpretation encountered. A key question here is to define a single item of interpretation. For example, four individual panels on a site should be regarded as four separate items of interpretation, regardless of any links between them in terms of subject matter etc. However, if the panels are presented together in a single display, they collectively represent one item of interpretation. Similarly, if the panels are the basis for a single self-guided trail, they should also be treated as collectively one item of interpretation. It will be necessary to use some judgement on this matter, and take whatever approach you think most appropriate given the circumstances.

Question 1: The site name refers to the place where the interpretation is located. This could be a nature reserve, historic monument, settlement or wider area of countryside etc.

Question 2: Recording surveyor details will enable you to track who filled in each form.

Question 3: Recording the date of the survey will enable a baseline to be established at a known point in time, against which future surveys can be compared.

Question 4: The Ordnance Survey grid reference should be given as a 6 or 8 digit number (depending on the degree of accuracy required), preceded with the map grid reference letters. Eastings are always given before Northings, and should be calculated from the relevant OS 1:25,000 scale map. Each OS map has instructions about how to give a grid reference. An 8 digit number will enable the data to be entered into a GIS database with maximum accuracy.

Question 5: The interpretive item should be coded from the list of media. Most media will be easy to classify. However, you will sometimes need to use your judgement about the classification. For example, in differentiating a ‘talk / lecture’ from a ‘demonstration’, and deciding where one ‘display’ ends and an adjacent one begins (and hence when to start a new questionnaire).

Where the interpretation is a self-guided trail based on a number of panel/s (with or without a leaflet), we suggest you regard the panels as a single unit, and base your scores on a collective assessment of all the panels / leaflets.

Question 6: Topic/s should be coded from the list given. It may be difficult to differentiate some topics from others (e.g. local history and national history), so you will need to use your judgement. It is common for a single item of interpretation to cover more than one topic, and you should code all that apply.

Question 7: The managing organisation is the body that provides and / or manages the interpretation. Where a number of organisations have collaborated to provide the interpretation, the lead agency should be recorded.

Question 8: Where appropriate, you should record the date of provision. This will usually apply to events, but also to fixed interpretation at sites only open at certain times. If an event takes place on a regularly repeating basis, you should record when this is (e.g. ‘every day at 14.00’; ‘the first Saturday of each month’ etc).

Question 9: You should record any standard charges made to access the interpretation. This will most often apply to events, but also to any sites that charge for access.

Question 10: You should indicate whether any aspect of the interpretation is designed to cater for disabled visitors.

Question 11: You should indicate whether the interpretation is translated into any languages other than English.

6.3 Questionnaire 2: indoor facilities

Questionnaire 2 should be used to collect data about the interpretation within a built facility. You should complete **one** form for each **facility**.

At sites where there is both indoor and outdoor provision, **both** types of questionnaire should be used. Where a site comprises a **number** of built facilities (like an outdoor museum), **one** form should be completed covering **all** the indoor facilities. Any outdoor items should be recorded on individual item forms.

Question 1: The facility refers to the place housing the interpretation.

Question 2: Recording surveyor details will enable you to track who filled in each form.

Question 3: Recording the date of the survey will enable a baseline to be established at a known point in time, against which future surveys can be compared.

Question 4: The Ordnance Survey (OS) grid reference should be given as a 6 or 8 digit number, preceded with the map grid reference letters. Eastings are always given before Northings, and should be calculated from the relevant OS 1:25,000 scale map. . Each OS map has instructions about how to give a grid reference. An 8 digit number will enable the data to be entered into a GIS database with maximum accuracy.

Question 5: You should indicate what type of facility is being surveyed. The most common ones are identified on the questionnaire.

Question 6: The interpretive items should be coded from the list of media. Please list all that apply. Again, you may need to use your judgement in classifying the media.

Question 7: Topics should be coded from the lists given. Please list all that apply.

Question 8: The managing organisation is the body that provides and / or manages the interpretation. Where a number of organisations have collaborated to provide the interpretation, the lead agency should be recorded.

Question 9: Please indicate opening times as appropriate.

Question 10: Please indicate admission charges as appropriate.

Question 11: You should indicate whether any aspect of the interpretation is designed to cater for disabled visitors.

Question 12: You should indicate whether the interpretation is translated into any language other than English.

Question 13: You should note whether there are any plans to update, expand or improve the existing interpretive facilities. This will require an interview with the facility manager / operator.

7. How to Undertake a Quality Assessment

The quality assessment will give you an indication of the prevailing standards of the existing interpretation. It is based on scoring the interpretation against a series of simple criteria. Data should be collected through site visits and reviews of interpretive material.

7.1 Media

As noted in section 4 above, a wide range of media are used in interpretation, often to meet a range of objectives. For example, an audio-visual show may be used to provide an introduction to the subject and its wider context, whereas a panel is usually used to convey information about a specific point of interest. It is thus not possible to devise a set of simple questions that apply universally. Therefore we have produced two separate questionnaires for (i) panels, leaflets, displays and exhibitions, and (ii) audio and audio-visual facilities.

Other media used in interpretation do not lend themselves to this type of quality assessment, and are excluded from our methodology. The excluded media are:

- Events and guided walks (excluded because of the influence an assessor can have on the delivery of the interpretation, and because of the many factors that can affect the quality of an event – weather, audience response etc);
- Arts media (excluded because of the affective nature of the audience response, and the difficulties in defining a specific message that such media are trying to communicate); and
- Computer-based media (excluded because of the complex and rapidly evolving ways in which computer and IT facilities are used for interpretation and information provision).

If you are interested in assessing the quality of interpretive events, we would refer you to a recent study on this subject *Improving interpretive services in guided tours: lessons from field-based research on Australian ecotour guides*² by Betty Weiler. Dr Weiler used a combination of user questionnaires, direct observation of guides, interviews with guides, and analysis of audiotapes of the tours to measure the quality of ecotour guiding.

Her key findings are as follows:

- When using questionnaires to find out what users thought about a tour, open-ended or qualitative questions gave better results than rating scales.

² Dr Betty Weiler, Associate Professor, RMIT University, GPO Box 2476V, Melbourne, VIC 3001, Australia. weiler@rmit.edu.au

- The use of other expert interpreters to assess the quality of tour guides worked well, but this needs to be carried out in a careful, systematic and objective way.
- In assessing guides for promotion or accreditation, there needs to be a portfolio of evidence from which to draw.
- The process of assessing interpretive guides itself can be a learning tool if done sensitively.

7.2 Accessibility

As well as assessing the quality of the interpretation, it is important to measure how accessible it is. We have therefore incorporated a number of ‘access’ questions into the survey. These relate to presentational qualities such as the use of text headings, paragraph length and reading age, and not to issues of recreational access such as path surfacing and path width.

The following notes provide detailed guidance on completing the questionnaires. Again, we suggest you study these with a copy of the questionnaires to hand (**Appendix 1**):

7.3 Assessing displays, exhibitions, panels and printed material

Questionnaire 3 should be used to collect data about displays, exhibitions, panels and printed material, indoors and out. **Each** item should be recorded on a **separate** form.

For text based interpretation, please read the whole text first before completing the form.

Question 1: The ‘site/facility’ refers to the place that is being interpreted.

Question 2: Recording surveyor details will enable you to track who filled in each form.

Question 3: Recording the date of the survey will enable a baseline to be established at a known point in time, against which future surveys can be compared.

Question 4: The interpretive item should be coded from the list of media. Most media will be easy to classify. However, you will sometimes need to use your judgement about the classification. For example, in differentiating a ‘talk / lecture’ from a ‘demonstration’, and deciding where one ‘display’ ends and an adjacent one begins (and hence when to start a new questionnaire).

Where the interpretation is a self-guided trail based on a number of panel/s (with or without a leaflet), you should regard the panels as a single unit, and base your scores on a collective assessment of all the panels / leaflets.

Question 5: The managing organisation is the body that provides and / or manages the interpretation. Where a number of organisations have collaborated, the lead agency should be recorded.

Question 6: Good practice suggests that interpretation should be clearly and specifically related to objects, features or events in the immediate surroundings. You should indicate whether this is the case. Different media do this in different ways, and this is reflected in the 3 sub-questions.

Question 7: Interpretation should encourage the visitor to notice and / or explore the things around them. You should indicate to what extent the interpretation does this. A simple 4-point scoring system is provided.

Question 8: Interpretation should help the visitor explore the subject further if they are interested. You should indicate to what extent the interpretation does this.

Question 9: Interpretation should relate to its audience. Common ways of doing this are through the use of personal language, analogies, metaphor and humour. You should indicate to what extent the interpretation attempts to do this.

Question 10: Interpretation works best if it is based on a clearly defined idea or message. This can be called the theme of the interpretation - as defined by Sam Ham (1992)³ and discussed by Freeman Tilden (1957)⁴. In practice, this means that each item of interpretation should attempt to communicate a single or limited number of specific ideas / messages about its subject. These ideas / messages can be very simple, and do not have to be spelt out verbatim. A piece of interpretation that is not themed in this way may end up presenting a jumble of facts and figures without any clear logic or common thread. Research suggests that this is more difficult for the audience to assimilate and understand, and that people remember thematic ideas much better than they remember facts and figures.

This thematic assessment is possibly the most difficult to judge, so as an aid we provide a simple sentence for you to complete that summarises the main message / idea of the interpretation. If you cannot easily complete this sentence, then the interpretation is probably not thematic.

Question 11: Interpretation must be accessible to its audience. In interpretation terms, this relates to issues such as the presentation of text and graphics, the positioning of panels, and the supply of publications. Therefore, you should assess the following:

³ Ham, S. 1992. *Environmental Interpretation: a practical guide for people with big ideas and small budgets*. North America Press. Colorado

⁴ Tilden, F. 1957. *Interpreting our Heritage*. The University of North Carolina Press

- Whether the text is clearly printed and legible; is complemented by headings and / or sub headings; is presented in a design hierarchy⁵; is divided into paragraphs of no more than 100 words; and uses correct spelling, grammar and syntax.
- Whether any fixed item is positioned at an appropriate height.
- Whether any fixed item is located at a place where there is space to view it comfortably.
- Whether there is an adequate supply of publications on public display (i.e. they are not about to run out).
- The readability or reading age of the text.

The reading age or readability of a piece of text can be assessed in a number of ways. Details of two ways to measure reading age are given in Appendix 2. Although a useful criterion, reading age is time-consuming to measure, and we suggest it should only be surveyed if necessary.

Question 12: Illustrations can be a powerful component of interpretation. Good interpretation will use illustrations in an appropriate manner. To meet basic standards, illustrations should be:

- Clear and easily understood
- Of an appropriate size
- Visually stimulating
- Have a clear relationship to any text
- Complement the text, or what can already be seen, rather than duplicating it

Please score each question as appropriate.

Question 13: Good design will improve the quality of the interpretation. Although one of the more subjective measures to assess, you should try and judge to what extent the design is ‘attractive and stimulating’.

Question 14: Poorly maintained interpretation reflects poor standards. We have identified three simple measures to assess, in broad terms, if the interpretation is being well maintained.

There is also a text box at the end of the questionnaire for notes and comments as necessary, but keep these as brief as possible.

As a general point, where an answer is not known, or where it is impossible to reach a judgment, leave it blank. This will prevent any guessed or inaccurate data from distorting the final analysis. Where relevant, we have included a ‘not appropriate’ (NA) option.

⁵ A design hierarchy means that the heading/s, sub heading/s and body text/s are printed in different sizes, styles or typefaces to reflect their relative importance.

7.4 Assessing audio and audio-visual displays

Questionnaire 4 should be used to collect data about audio and audio-visual interpretation.

Question 1: The ‘site/facility’ refers to the name of the place that is being interpreted.

Question 2: Please record the surveyor’s name as before.

Question 3: Please record the date of the survey as before.

Question 4: Please record the item being assessed using the appropriate code. Each item being assessed should be recorded on a separate form.

Question 5: The managing organisation is the body that provides and / or manages the interpretation. Where a number of organisations have collaborated, the lead agency should be recorded.

Question 6: Good audio and audio-visual interpretation will either be clearly related to objects, features or events in the immediate surroundings, or provide an interesting introduction to the subject being interpreted. You should indicate whether it does either of these.

Question 7: Any commentary accompanying the interpretation must hold your attention. Use your judgement to indicate to what extent the interpretation does this. A simple 3-point scoring system is provided, plus a ‘not applicable option’.

Question 8: There are a number of ways in which audio-visual displays can add to their impact. Specific ways in which they can do this are through the use of:

- Musical accompaniment
- A celebrity voice over / actor
- High quality pictures / video
- Innovative editing / projecting techniques
- A story- or character-based narrative

You should note whether the interpretation does incorporate any of these techniques.

Question 9: There are a number of ways in which audio facilities can add to their impact. Specific ways in which they can do this include the use of:

- Musical accompaniment
- A celebrity voice over
- Innovative editing / use of sound effects
- A story- or character-based narrative

Again, you should note whether the interpretation incorporates any of these.

Question 10: Good practice suggests that audio / audio-visual interpretation should encourage the visitor to notice and explore the things around them; or stimulate a general interest in the subject being interpreted. You should use your judgement and indicate to what extent the interpretation does this. A simple 4-point scoring system is provided.

Question 11: Interpretation should relate to its audience. The simplest and most effective ways of doing this are through the use of personal language, analogies, metaphor and humour. You should indicate to what extent the interpretation does this.

Question 12: Interpretation should help the visitor explore the subject further if they are interested. You should indicate to what extent the interpretation does this.

Question 13: Interpretation works best if it is based on a clearly defined idea or message. This means that each item of interpretation should attempt to communicate a single or limited number of specific ideas / messages about its subject. Again, you should try to discern what the main idea is that the interpretation is trying to communicate and complete the sentence given on the questionnaire. If you cannot easily complete the sentence, then the interpretation is probably not thematic.

Question 14: Good interpretation must be accessible. Therefore you should assess the following:

- Whether the commentary is clear and audible
- Whether the projection is clear and in focus
- Whether the room is dark enough to see the projection
- Whether the length of the programme is appropriate given the circumstances (e.g. <5 minutes for a standing audience).

Question 15: Poorly maintained interpretation reflects poor standards. We have identified two simple measures to assess, in broad terms, if the interpretation is being well maintained.

8. Notes on coding

We have specified a coding system to be used in completing the forms. The same coding should subsequently be used in the database.

We set out below some definitions and explanatory notes about the interpretive media. These definitions are not absolute, and you will at times need to use your judgement as to how to classify a piece of interpretation. Please study the following with a copy of the coding system to hand (Appendix 1).

A **guided walk / tour** can be any walking, cycling, horse, car or boat based excursion led by a guide.

A **self-guided tour / trail using printed material** is where visitors explore a site / facility under their own initiative using leaflets and / or panels.

A **self-guided tour / trail using audio facilities** is where visitors explore a site / facility using an audio system.

A **general site or facility leaflet** gives an introduction to the site / facility, and may cover a number of topics.

A **topic-based leaflet** focuses on a specific topic, possibly with reference to more than one site / facility.

A **booklet** is a publication using more than sheet of paper but usually less than 50 pages in length and intended for use on site.

A **souvenir guide** is a glossy publication intended for use off site.

A **panel** refers to purpose-built interpretive signs usually presenting a range of text, images and graphics.

A **display comprising several panels** refers to a number of panels in close proximity focusing on the same subject matter.

Other inscribed picture / text refers to plaques / stone carvings etc. that have an interpretive function.

An **enquiry desk** is a staffed desk where visitors can ask for information etc.

Facility staff refers to staff available to answer questions about a place or facility, but not as part of a structured tour or lecture.

An **information point / stand / marker** refers to fixed, text-based interpretation not in the form of a panel.

Classroom facilities are provided for organised education groups.

A **computer / IT display** is any form of interpretation based on digital media, such as CD-Rom, computer screens etc.

An **audio-visual display** combines projected images and a soundtrack, usually in the form of a slide-tape show, film or video.

A **listening post** is a point where visitors can listen to a commentary or soundtrack, usually associated with a larger display.

A **mechanical interactive display** is an interactive display where the user is required to physically move one or more moving parts.

A **3-D model or display** is any form of 3-dimensional display or model with or without moving parts.

A **temporary exhibition / display** is any form of exhibition or display located somewhere for less than 12 months.

Living display / aquaria refers to any display based on live organisms (flora and fauna)

Object / animal handling refers to any facility for feeling and touching objects and / or live animals. A good example would be a touch tank.

Original objects / artefacts is self-explanatory.

Replica objects / artefacts is self-explanatory.

Historic re-enactment is the theatrical rendition of historic events and / or characters.

A **festival** is an event comprising a number of separate components, usually taking place over at least a day and often considerably longer.

A **theatrical event** is a single, theatre based event.

An **arts installation** refers to any fixed artwork such as a sculpture.

A **talk / lecture** refers to a structured presentation at a specific place.

A **demonstration** is any live interpretation based on showing visitors how something is done.

9. Training the Surveyors

In order to successfully apply the questionnaires, the surveyors will require some structured training and practice in using them. This should involve the use of examples of good and bad interpretation which illustrate the various parameters being tested by the questionnaires, and help anchor the ends of the scoring scales (e.g. examples of interpretation that use personal language 'not at all', 'a little', 'a moderate amount' and 'a lot'). It should also include a slide display to illustrate all different media identified above.

We suggest the training should take place in a two-stage process - an initial session to familiarise staff with the questionnaires and review some 'baseline' examples, followed by a second session after the surveyor/s have had time to try the questionnaires out on the ground. This will provide an opportunity to iron out any last uncertainties about the survey questionnaires.

10. Setting-up a Database

When the survey is complete, you are ready to enter the data to a database. There are a number of ways you could set this up, depending on what analysis you wish to make of the data. The following guidelines suggest how you could proceed:

1. We recommend you use widely available software, such as Microsoft Excel. If the data is held in a common format, it will be easier to make comparisons between surveys, and to disseminate the results to a wider audience.
2. It is very important to keep the inventory database separate from the quality assessment database. This is because you will need to interrogate and analyse the data in different ways. A combined database would also be very large and unwieldy.
3. All closed-ended questions can be inputted through a data coding system. The resulting database will be easier to interrogate and analyse.
4. The coding system used on the forms should be used when inputting data.
5. The forms were designed with a minimum of open-ended questions. Those that do exist should be inputted in text form as succinctly as possible.

11. Analysing and Interpreting the Data

Once entered onto the database, the information is ready for analysis. We suggest below possible analyses to indicate how the data might be used.

11.1 Inventory data

The inventory will provide information about key aspects of the existing interpretation. Particular questions the inventory can answer include:

- i. Where are interpretation facilities located?
- ii. What topics are most commonly interpreted?
- iii. What topics are least interpreted?
- iv. What are the current gaps in provision?
- v. What media are being used?
- vi. What proportion of the interpretation is intended for disabled use? What is the nature of these facilities (e.g. mostly Braille)?
- vii. What proportion of interpretation is provided by public, private and the voluntary bodies?
- viii. What proportion of facilities have plans for expanding, updating or improving their interpretation?
- ix. Which organisations are providing interpretation?
- x. What proportion of the interpretation is translated into other languages?
- xi. What opening times and admission charges apply?

These may all be key questions to answer in developing policies and strategies for future interpretation development.

11.2 Quality assessment data

The quality assessment data can be used to do a number of things:

Firstly, it can be used to identify to what extent the interpretation is truly 'interpretive'. This relates to what degree the interpretation provokes interest, reveals meaning and relates to the audience. The higher the score on the questions that relate to these measures, the more 'interpretive' it is. These questions are:

- Is the interpretive item clearly and specifically related to features, objects, or events in the immediate surroundings?
- How much does it encourage visitors to look at, touch, listen to, smell, taste or otherwise explore the things around them?
- How much does it relate to the audience?
- Does the interpretation communicate either a single or limited number of linked idea(s) or message(s) about its subject?

In addition, for audio- and audio-visual media, the questions relating to the use of techniques which will add impact relate to the overall interpretive value of the facility.

If the data is used to assess to what extent the interpretation is truly interpretive, we suggest these questions should be given greater importance in the analysis. For example, the following specific questions could be asked of the database:

- i. What proportion of the interpretation scores highly on **each** of the 'interpretive' questions?
- ii. What proportion of the interpretation scores highly on **all** of these questions?

The lower the proportion of interpretation that scores well on these questions, the bigger the quality deficiency.

Secondly, the database can be used to determine overall levels of accessibility of the interpretation. This is a fundamental measure of quality that can easily be overlooked. Professional interpreters will be aware of accessibility issues, but others responsible for site management, commissioning interpretation or grant-aid may not be. Specific questions that can be asked of the database include:

- i. What proportion of the interpretation scores 'yes' on **each** of the relevant accessibility questions?
- ii. What proportion of the interpretation scores 'yes' on **all** of the relevant accessibility questions?

Again, the lower the proportion that scores well on these questions, the bigger the quality deficiency.

Thirdly, the database will highlight quality standard issues relating to design and the use of illustrations. Again, these are matters of critical importance to good interpretation. Specific questions that can be asked of the database include:

- i. What proportion of the interpretation scores 'yes' on **each** of the relevant graphics questions (i.e. question 12.1 – 12.5)?
- ii. What proportion of the interpretation scores 'yes' on **all** of the relevant graphics questions?

Fourthly, the database will highlight maintenance needs and deficiencies. This can be used to highlight the proportion of the interpretation that is being well or poorly maintained.

11.3 Caveats

There are a number of final caveats that should be considered when analysing the quality assessment data. These are:

- Each item of interpretation should have specific objectives set for it. This methodology cannot assess the effectiveness of any individual piece of interpretation in terms of its own specific objectives.
- Different media are used to meet different interpretive objectives, and any general comparison between the quality and effectiveness of different media on the basis of this survey will be misleading.
- Finally, data may be collected on the extent of wheelchair access to interpretation facilities. However, wheelchair access is not always appropriate or possible - many historic buildings, for example, have areas which cannot be accessed by wheelchairs. Similarly, it can be argued that remote viewpoints should remain undeveloped, and that the infrastructure required to facilitate wheelchair access would detract from their unspoiled quality. Therefore, any interpretation of the data on disabled provision should assume that in a proportion of cases wheelchair access is not appropriate. This does not preclude the possibility of providing other forms of interpretation for the disabled.

Appendix 1: Survey questionnaires

Questionnaire 1: Inventory Survey form for individual items of interpretation

This form should be used to record details of individual items of outdoor interpretation. Use a separate form for each piece of interpretation. Interpretation within a visitor centre, museum, historic house or other built facility should be recorded on the built facilities form.

1. Site name:
2. Surveyor:
3. Date surveyed:
4. OS grid reference:
5. Interpretive item (please give appropriate code no.):
6. Topic/s (please list code numbers for all that apply):
7. Managing organisation:
8. Date/s of provision (if applicable):
9. Charge (if applicable): Charge per single adult £..... per single child £.....
10. Is any aspect of the interpretation designed to cater for disabled users?
Yes / No
If yes, please indicate which of the following is provided:
Braille / audio facilities / sign language / wheelchair access / large print /
Other
11. Is the interpretation translated into any language/s other than English?
Yes / No
If yes, please specify which of the following:
Gaelic / French / German / Spanish / Italian / Dutch / Japanese /
Other

Questionnaire 2: Inventory Survey form for built facilities

Please complete one of these forms for each visitor centre, museum, historic house or other built facility.
Outdoor interpretation should be recorded on the individual items survey form.

1. Facility name:
2. Surveyor:
3. Date surveyed:
4. OS grid reference:
5. Facility type: Visitor centre / museum / historic house / castle / religious building /
other.....
6. Interpretive item/s (please list all interpretive media in the facility using appropriate code nos.):
7. Topic/s (please list code numbers for all that apply):
8. Managing organisation:
9. Opening times: All year / seasonal / weekdays / weekends / other.....
10. Charge (if applicable): Charge per single adult £.....single child £.....
11. Is any aspect of the interpretation designed to cater for disabled users? Yes / No If yes, please indicate which of the following is provided:
Braille / audio facilities / sign language / wheelchair access / large print /
other.....
12. Is the interpretation translated into any language/s other than English? Yes / No If yes, please specify which of the following:
Gaelic / French / German / Spanish / Italian / Dutch / Japanese /
Other
14. Are there any plans to expand, update or improve the existing interpretive facilities? Yes / No (If yes, please give details)
.....
.....

Questionnaire 3: Assessing interpretive quality

Survey form for displays, exhibitions, panels and printed material

This form should be used for interpretive displays, exhibitions, panels and printed material. Please complete a separate form for each individual piece of interpretation.

1. Site / facility name:

2. Surveyor:

3. Date surveyed:

4. Interpretive item (please give code number):

5. Managing organisation:

6. Is the interpretive item clearly and specifically related to features, objects, or events in the immediate surroundings?

6.1. For fixed outdoor media such as panels, can you see the subject of the interpretation from the location of the panel?

6.2. For fixed media inside a building, is the building clearly associated with the site or place that is being interpreted?

6.3. For media designed to be used on the move, does the interpretation refer to specific features that you can see?
.....Yes / No

7. How much does the interpretation encourage visitors to notice and explore the things around them?

7.1. Does it draw attention to specific features that you can see, touch, hear, smell or taste? Or

7.2. Does it specifically ask you to look at, touch, listen to, smell or taste these things?
.....Not at all / a bit / a moderate amount / a lot

8. Does the interpretation offer or suggest ways to explore the subject further?

8.1. Does it suggest other places to visit or explore that are connected to the main subject? Or

8.2. Does it give sources of further information (books, places to go, organisations to contact)?
.....Not at all / a bit / a moderate amount / a lot

9. How much does the interpretation relate to the audience?
- 9.1. Does it use personal language (e.g. by addressing the audience as ‘you’), or
- 9.2. Does it make links or comparisons between its subject and peoples’ everyday lives or common experiences (e.g. by using analogies and metaphor), or
- 9.3. Does it use humour?
Not at all / a bit / a moderate amount / a lot

10. Does the interpretation communicate either a single or a limited number of specific idea/s or message/s about its subject?
Yes / No

If it does, you should be able to complete the following sentence for each idea / message:
 “The main idea / message communicated by this is that

.....

11. How accessible is the interpretation?

11.1. Is the text clearly printed and legible?.....Yes / No / NA

11.2. Is the text complemented by headings and / or sub-headings?.....Yes / No / NA

11.3. Is there a text hierarchy?.....Yes / No / NA

11.4. Is the text divided into paragraphs of < 100 words?.....Yes / No / NA

11.5. Is the spelling, syntax and grammar correct?.....Yes / No / NA

11.6. If a panel or display, is it fixed at an appropriate height?.....Yes / No / NA

11.7. If a panel or display, is there enough space to view it comfortably?.....Yes / No / NA

11.8. For a publication, is there an adequate supply? (at least 10 copies).....Yes / No / NA

11.9. What is the readability or reading age of the text?

12. Is effective use made of illustrations (photographs, drawings, and / or pictures)?

12.1. Are they clear and easily understood?.....Yes / No / NA

12.2. Are they of an appropriate size for the piece of interpretation?.....Yes / No / NA

12.3. Are they visually stimulating?.....Yes / No / NA

12.4. Is their relationship to the text clear?.....Yes / No / NA

12.5. Do they complement the text, or what you can see, rather than simply duplicate it?.....Yes / No / NA

13. Is the design of the interpretation attractive and stimulating?

.....Not at all / a bit / a moderate amount / a lot

14. Is the interpretation well maintained?

14.1. Are the materials in good condition?.....Yes / No / NA

14.2. Is there any evidence of vandalism and / or general wear and tear?.....Yes / No / NA

14.3. Do any mechanical or electronic devices work correctly?.....Yes / No / NA

Notes and comments:

Questionnaire 4: assessing interpretive quality

Survey form for audio and audio-visual displays

This form should be used for audio and audio-visual displays. Please complete a separate form for each individual piece of interpretation.

1. Site / facility name:
2. Surveyor:
3. Date surveyed:
4. Interpretive item (please give code number):
5. Managing organisation:
6.
 - 6.1. Does the interpretation provide an introduction to the subject being interpreted? Or
 - 6.2. Does it refer to specific features which you can see either on the surrounding site or in any related displays?
.....Yes / No
7. To what extent does any commentary hold your attention?
None of the time / some of the time / all of the time / NA
8. For audio-visual facilities, which of the following are used to add impact?
 - 8.1. Musical accompaniment.....Yes / No
 - 8.2. Celebrity actor / voiceover.....Yes / No
 - 8.3. High quality pictures / video.....Yes / No
 - 8.4. Innovative editing / projecting techniques.....Yes / No
 - 8.5. Story- or character-based narrative.....Yes / No
9. For audio facilities, which of the following are used to add impact?
 - 9.1. Musical accompaniment.....Yes / No
 - 9.2. Celebrity voiceover.....Yes / No
 - 9.3. Innovative editing or sound effects.....Yes / No
 - 9.4. Story- or character-based narrative.....Yes / No

10. How much does the interpretation:

10.1. Encourage visitors to look at, touch, listen to, smell or taste the things around them? Or

10.2. Stimulate a general interest in the subject being interpreted?

.....Not at all / a bit / a moderate amount / a lot

11 How much does the interpretation relate to the audience?

11.1 Does it use personal language (addressing the audience as ‘you’), or

11.2 Does it make links or comparisons between its subject and peoples’ everyday lives or common experiences (e.g. by using analogies and / or metaphor), or

11.3 Does it use humour?

.....Not at all / a bit / a moderate amount / a lot

12 Does it offer or suggest ways to explore the subject further?

12.1 Does it suggest other places to visit or explore that are connected to the main subject? Or

12.2 Does it encourage users to explore the site or collection to which it relates? Or

12.3 Does it give sources of further information (books, places to go, organisations to contact)?

.....Not at all / a bit / a moderate amount / a lot

13 Does the interpretation communicate either a single or a limited number of idea/s or message/s about its subject?

.....Yes / No

If it does, you should be able to complete the following sentence for each idea / message:

“The main idea / message communicated by this is that.....

14. How accessible is the interpretation?

14.1. Is the commentary clear and audible?.....Yes / No / NA

14.2. For an audio-visual facility, is the projection clear and in focus.....Yes / No / NA

14.3. For an audio-visual facility, is the room sufficiently dark to see the projection?.....Yes / No / NA

14.4. For an audio-visual facility, is the length of the show appropriate to the circumstances?

.....Yes / No / NA

14.5. For an audio tour, does it last no more than 40 minutes, or allow the user to switch

it on and off whilst walking around the site?.....Yes / No / NA

15. How well maintained is the interpretation?

15.1. Is the equipment in good working order?.....Yes / No

15.2. For an audio-visual facility, is the screen in good condition?.....Yes / No

Notes and comments:

Interpretation Survey
Coding to be used on the survey recording forms:

Interpretive items Should be classified as follows:	Topics Should be classified as follows:
Guided walk / tour.....1	National history.....101
Self guided tour / trail using printed material.....2	Local history.....102
Self guided tour / trail using audio facilities.....3	Archaeology.....103
General site or facility leaflet.....4	Religion.....104
Topic-based leaflet.....5	Arts and crafts.....105
General site or facility booklet.....6	Wildlife / natural history.....106
Topic-based booklet.....7	Habitat management / nature conservation.....107
Souvenir guide intended for use off site.....8	Landscape.....108
Education pack.....9	Earth science.....109
Single panel.....10	Landuse (including agriculture and forestry).....110
Display comprising several panels.....11	Fisheries and marine science.....111
Other inscribed picture / text.....12	Industry and mining.....112
Enquiry desk.....13	Landownership and estates management.....113
Facility staff.....14	Communications and transport.....114
Information point / stand / marker.....15	Weather and climate.....115
Classroom facilities.....16	Energy and pollution.....116
Computer / IT display.....17	Economic development.....117
Audio-visual display.....18	Other.....118
Listening post.....19	
Mechanical interactive display.....20	
3-D model / display.....21	
Temporary exhibition / display.....22	
Living display / aquaria.....23	
Object / animal handling.....24	
Display of original objects or artefacts.....25	
Display of replica objects or artefacts.....26	
Historic re-enactment.....27	
Festival.....28	
Theatrical event.....29	
Arts installation.....30	
Talk / lecture.....31	
Demonstration.....32	
Other.....33	

Appendix 2: Measuring readability and reading age

1. The SMOG test

The SMOG (Simple Measurement Of Gobbledegook) test is a relatively quick measure of the **readability** of text. Readability is an attempt to match the reading level of written material to the 'reading with understanding' level of the reader. As interpretation is usually aimed at a general audience, its readability should be accessible to most people.

The test works as follows:

Select the text

Count 10 sentences

Count the number of words in these 10 sentences that have 3 or more syllables (nb. Ignore dates and real names)

Multiply this number by 3

Select the number on the following scale closest to the answer

1	4	9	16	25	36	49	64	81	100	121	144	169
---	---	---	----	----	----	----	----	----	-----	-----	-----	-----

Find the square root of the relevant number on this scale

1	4	9	16	25	36	49	64	81	100	121	144	169
1	2	3	4	5	6	7	8	9	10	11	12	13

Add 8

This is the readability of the text.

A readability level of 10-12 is appropriate for most interpretation.

2. The Fry test

The Fry test is a measure of **reading age** that is more accurate but takes longer to apply than the SMOG test. Reading age is a measure of how easy it is to understand a piece of text. It is not related to either the mental age or physical age of the readers.

It works as follows:

Select three passages of 100 words from the text you want to test.

Count the number of sentences in each passage, and calculate the average number of sentences per 100 words.

Count the number of syllables in each passage. Syllables are parts of a word which can be sounded individually: 'syllable' has three syllables, 'the' has one, 'chicken' has two. It is easier to keep track of your count if you go through the text marking the number of syllables in pencil above each word, then go through adding them all up. Calculate the average number of syllables per 100 words.

Plot the intersection of the average number of sentences per 100 words, and the average number of syllables per 100 words, on the graph. If the intersection falls outside the broad lines, the result is outside the statistical reliability of the test.

Shorter sentences, and shorter words, give a lower reading age. However, it is difficult to write deliberately to a particular reading age: the test is useful as a guide to the complexity of what you have written.

A score of 14 or 15 is probably appropriate for most interpretation. Long words which you cannot avoid using, such as place names, will raise your syllable score, but do not necessarily mean that the text is difficult to understand.

Some word processing programmes (e.g. Microsoft's Word) include tests which give a 'reading ease' score. These are often based on U.S. school grades, rather than reading ages - check the manual for details.