

Strategic Planning for Interpretation

September 25-28, 2017

Training Syllabus



William Penn Mott Jr. Training Center



Memorandum

Date: August 24, 2017
To: Supervisor
From: Debbie L. Fredricks, Chief
Training Section
California State Parks
Subject: Employee Attendance at Formal Training

An employee from your office will soon be attending the formal training program described in the attached. Ensure that the employee is fully prepared to attend the session and that the groundwork is laid for the employee's implementation of the training upon returning to work. You can assist with capturing the full value of the training by taking the following steps:

Prior to Training

1. Make sure that **specific** employee needs are identified and, if necessary, called immediately to the attention of the Training Coordinator.
2. Review with the employee the reason for the employee's attendance.
3. Review objectives and agenda with the employee.
4. Discuss objectives and performance expected after the training.

Immediately Following Attendance

1. Discuss what was learned and intended uses of the training.
2. Review the employee's assessment of the training program for its impact at the workplace.
3. Support the employee's use of the training at the work place.

Three Months Following Training

1. Supervisor evaluates the effectiveness of the training on the employee's job performance and login to the ETMS to complete the Training Effectiveness Assessment form.

Thank you for your assistance in seeing that the full benefit of training is realized.



Debbie L. Fredericks
Training Section Chief

Attachment
cc: Participant

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Mission Statement Training Section

The mission of the Training Section is to improve organizational and individual performance and productivity through consulting, collaboration, training, and development.

TRAINING SECTION STAFF

Debbie L. Fredricks.....	Training Section Chief
Ann D. Slaughter	Mott Training Center Manager
Jack Futoran	EMS and LFG Training Coordinator
Jeff Beach.....	Training Consultant
JD Dinnauer.....	Training Consultant
Dave Galanti	Training Consultant
Karyn Lombard	Training Consultant
Sara M. Skinner	Training Consultant
Jason Smith	Academy Coordinator
Jeremy Alling	Cadet Training Officer
Matt Cardinet	Cadet Training Officer
Raymund Nanadiego	Cadet Training Officer
Lisa Anthony	Program Coordinator
Edith Alhambra	Assistant Program Coordinator
Alex Franck.....	Assistant Program Coordinator
Jessica Kohls.....	Assistant Program Coordinator
Pamela Yaeger.....	Assistant Program Coordinator

THE MISSION

of the California State Parks is to provide for the health, inspiration, and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and creating opportunities for high quality outdoor recreation.



FORMAL TRAINING GUIDELINES

Welcome to formal training, an essential component in your career development.

Since 1969, our Department has been providing a continuously changing number of diverse training programs at its main training facility, the William Penn Mott Jr. Training Center, and other locations including Marconi Conference Center. The Department strives to enhance your learning and job performance with formal training of the highest quality.

Our Department's dedication to training is only one aspect of its commitment to you and to the public. This commitment is costly and represents an important investment in you and your career. You and the Department realize a return on that investment by your positive participation in formal training itself and post training follow-through.

The program you will be participating in is described in this training syllabus, which outlines what you can expect from this training and what is expected of you. This syllabus details what you should do before you leave for training; what to do when you arrive; what you will be doing while in training; and, importantly, what you should be able to do when you return to your work site. Specifically:

1. **SYLLABUS:** The syllabus is now accessible on the Employee Training Management System (ETMS). Your copy of this syllabus is an important part of your training experience and should be brought with you to training. Read it before you arrive and review it following the program along with material you received at training.
2. **PRE-TRAINING ASSIGNMENTS:** Your completion of pre-training assignments is essential to the success of your training. You are responsible for all reading assignments in preparation for classroom sessions. Time will be provided during working hours to accomplish any assignments which involve either individual or group efforts and resources.
3. **TRAVEL:** Arrange your travel to and from the training site through your District or Office. (No reimbursement for travel expense – including per diem costs – will be approved for travel not specifically authorized in advance by the District Superintendent). Individuals may claim reimbursement for incidental expenses incurred as outlined in DAM 0410.6. The Mott Training Center does not have the capability to provide transportation to/from Monterey Airport.

The cost of your travel (airfare, mileage, rental car, etc.) is paid by your District or Office **to** and **from** the location of training.

4. HOUSING: Housing will be assigned to you on a shared-room basis and will be available from 3:00 p.m. on the date of arrival to 11:00 a.m. on the date of departure. The Department provides your room and board expenses at the Mott Training Center only. No per diem allowance will be authorized for living off-grounds. This does not preclude living off-grounds at your own expense. Advise the Training Consultant no later than one week before your scheduled arrival if you plan to live off-grounds. No animals are permitted in housing. In the event of an emergency, staff must know your room assignment; therefore, you may not switch rooms without staff approval. Overnight guests are not allowed. Quiet hour is 10:00 p.m.
5. **ENROLLMENT OR HOUSING CANCELLATION POLICY:** To cancel participation in a course, the participant must have their District Superintendent or Section/Office Manager send an email to the Training Specialist assigned to the course requesting to remove the participant. If you do not need lodging or must change or cancel your reservation for lodging, you must contact the Mott Training Center or Training Consultant assigned to the course at least 2 weeks prior to your date of arrival. Lodging, registration, and associated fees will be charged to the employee's District or Section/Office if a training cancellation is received with less than two weeks' notice.

The Mott Training Center is committed to ensuring that the reservation that has been made for you is accurate and needed.

6. MEALS: Meals will be provided, semi-cafeteria style, from dinner on the date of arrival through lunch on the date of departure. Meals will be served at 7:15 a.m. for breakfast, 12:00 noon for lunch, and 6:00 p.m. for dinner. Hot or box lunches may be provided on some days. If you require a special diet, contact the Training Consultant Sara M. Skinner to request the Asilomar Dietary Restriction form no later than two weeks prior to the course start date. The Training Consultant will forward the form to the appropriate Asilomar Conference Grounds staff.

In order to assist participants with limited mobility, Asilomar provides a shuttle to and from the dining hall. Contact either Asilomar staff upon check-in, or Mott Training Center staff upon your arrival, for instructions on arranging a transport.

7. CLOTHING: Field uniforms as found in "Description of Required Field Uniforms", DOM Chapter 2300, Uniform Handbooks, not including optional items, will be worn daily by all uniformed employees during formal training sessions **unless otherwise specified in the Program Attendance Checklist**. Non-uniformed employees shall wear apparel normally worn on the job. Appropriate attire includes apparel suitable for professional office dress. It does not include such items as shorts, t-shirts, tank tops, or sandals.

Because we are on the conference grounds with many other groups, and the image we project as State Park employees is important not only during working hours but off duty hours as well, your informal sportswear should be appropriate.

8. **ALCOHOLIC BEVERAGES:** Participants shall not possess or consume alcoholic beverages in common areas (living room) while on the Asilomar Conference Grounds unless provided and hosted by Concessionaire ARAMARK.
9. **SMOKING:** Smoking is not permitted in the Mott Training Center or in any lodge or guest room on the Asilomar Conference Grounds.
10. **TRAINING CENTER:** The Mott Training Center is located on Asilomar Conference Grounds, part of Asilomar State Beach. The Conference Grounds are operated for our Department by a concessionaire, and all lodging and food services are provided to us by employees of the concessionaire. Constant efforts are made to maintain a sound, harmonious working relationship between the Department and concessionaire. None of us can expect preferential treatment for any reason and, as a departmental employee, you will be expected to join in our continuing effort toward an effective relationship with each Asilomar concession staff member. On occasion, non-departmental groups may be staying in the same lodges. It is imperative that you represent the Department well on and off duty.
11. **REGISTRATION:** When you arrive at Asilomar Conference Grounds, proceed directly to the front desk at the Asilomar Administration Building for your dining room tickets. If you require vegetarian meals, notify the front desk representative and your meal ticket will be marked accordingly.
12. **COURSE LEADERS:** The formal training you will attend is developed and, for the most part, conducted by experienced State Park employees in field and staff positions. Some courses will be conducted by qualified instructors from other agencies and educational institutions. Your course leaders have proven their ability and knowledge in their profession, and provide a level of expertise difficult to match.
13. **TRAINING SECTION STAFF:** Sara M. Skinner is your Training Consultant and has been assigned the responsibility for your training group. That staff member usually serves as a Course Leader as well as a Coordinator. During the program, you may be asked to assist Training Section Staff in the logistics of your training program (organizing field trip transportation, supervising classroom breaks, etc.). Training Section Staff will do all within their power to make your training experience pleasant and meaningful.
14. **TRAINING MATERIALS:** May be made available to you at both your unit and the Mott Training Center. Handout materials issued at your unit should be brought to training for possible use. A conference binder or notebook will be issued to you at the training session for note taking and convenience in handling materials. Copies of DAM and DOM will be available to you for self-study. Bring your own pens and pencils.

15. ATTENDANCE: Regular attendance is a critical course requirement and your participation is important to the success of this training. An absence of more than 10% of the course hours constitutes grounds for dropping a participant from the course. The Department Training Officer may modify this requirement based upon participant knowledge level and/or the portion of the course missed. All absences, except those of an emergency nature, must be approved in advance by the Training Specialist.
16. VEHICLES: All vehicles should be parked in the lots adjacent to the Mott Training Center. Any questions regarding use of a State vehicle while at the Mott Training Center should be discussed with your supervisor prior to your departure for training, or with your Program Coordinator while at the Mott Training Center.
17. BICYCLES: If you bring your bicycle, store it in the bicycle shed next to the Mott Training Center. Bicycles may not be brought into any building nor chained to lamp posts, trees, etc. The Mott Training Center has a limited number of bicycles available for your use. Prior to your use, you are required to complete a safety inspection and sign a waiver which is posted in the bicycle shed.
18. CELL PHONES: As a courtesy to your fellow participants and course leaders ensure that your cell phone is turned off during classes. Participants should not be receiving or making cell phone calls during class time. Limit those calls to your breaks.
19. FAX: The Mott Training Center's FAX number is (831) 649-2824.
20. TELEPHONE: Limit phone calls during classroom hours to urgent business or emergencies. Anyone wishing to contact you by telephone during working hours should call the Center at (831) 649-2954. Calls after 5:00 p.m. or during weekends should be made to (831) 372-8016, Asilomar Conference Grounds, and the caller should tell the switchboard operator you are with a California State Parks training group. **Note: There are no longer pay telephones outside of the Mott Training Center. There are pay telephones located at the Asilomar Administration Building.**
21. LAUNDRY AND DRY CLEANING: May be taken care of by you at one of several local establishments.
22. RECREATION: Facilities available on grounds include a heated swimming pool, pool tables, and a volleyball court. The Monterey area offers horseback riding, golf, tennis, racquetball, deep sea fishing, and many historical landmarks and scenic sights to explore.
23. POST-TRAINING ASSIGNMENTS: In connection with formal training are to be completed under the direction of your supervisor.
24. COFFEE BREAK REFRESHMENTS: Will be available throughout each session. You will be asked to contribute to the "Hospitality Fund" to defray expenses. Bring your own coffee cup.

PROGRAM ATTENDANCE CHECKLIST / PRE-TRAINING ASSIGNMENTS

To assist you in your preparation for formal training session at the William Penn Mott Jr. Training Center, the following list is provided:

- _____ 1. Read the Strategic Planning for Interpretation program syllabus prior to your arrival at the Mott Training Center.
- _____ 2. Arrange your travel through your Unit/District Office.
- _____ 3. Complete the following pre-training assignments:
 - Review at least one completed interpretation plan. Several plans are posted on the California State Parks public website; refer to http://www.parks.ca.gov/?page_id=28410 and scroll down to 'Completed Interpretation Master and Action Plans' and 'Sample Interpretive Service Plans.'
 - Utilize your park files, public website, and the Intranet prepare a list of previous planning documents for your Park, Sector, or District. **Bring a copy of your list to training and be prepared to discuss your findings during the first day of class.**
 - A copy of the California State Parks *Interpretation Planning Workbook* (2013) provided to each participant on the first day of in-class training. To view workbook prior to training refer to http://www.parks.ca.gov/?page_id=28410.
- _____ 4. Bring the following with you to training:
 - Program syllabus
 - Proper field uniform required as noted in the Formal Training Guidelines, Number 7, Clothing, on page 2 of this syllabus.
 - Reusable coffee mug, refillable water bottle, notepaper, pens, and pencils

If you have any questions or need assistance, contact Training Consultant Sara M. Skinner at (831) 649-2961 or Sara.Skinner@parks.ca.gov.

POST-TRAINING ASSIGNMENT

Prior to ninety days after the completion of this program, the employee and his/her supervisor should sit down and discuss the impact and assess the effectiveness this program has had on the employee.

The post-training evaluation process is intended to provide a bridge between classroom instruction and the on-the-job application of training. The information obtained through this process will assist the training participant, supervisor, and Training Section in providing a return on the investment the Department has on training.

STRATEGIC PLANNING FOR INTERPRETATION GROUP 2 AGENDA
September 25-28, 2017

Monday

September 25

Interpretation Planning Basics

0800-0900	Welcome to Strategic Planning for Interpretation	Skinner/Holm
0900-1000	Role of Planning: Big Picture	Fraser
1000-1100	Identifying Existing Planning Documents	Metraux/Holm
1100-1200	Identifying Planning Needs: Part One	Metraux
1200-1300	Lunch	
1300-1400	Case Study: Fort Ord Interpretation Master Plan	Clark-Gray
1400-1500	Identifying Planning Needs: Part Two	Holm
1500-1600	Assembling Your Team	Wilson
1600-1700	Getting started on your Planning Journey	Metraux

Tuesday

September 26

Assessing Existing Conditions

0800-0900	Identifying Your Audience	Rigby
0900-1200	Involving Stakeholders	Rigby
1200-1300	Lunch	
1300-1400	Consulting with Native Americans	Fonseca/Hennum
1400-1600	Assessing Existing Interpretation	Holm/Bradford
1600-1700	Case Study: Anza Borrego Interpretation Master Plan	Gerson

Wednesday

September 27

Developing Interpretive Improvements

08:00-10:00	Framing the Interpretive Direction: Themes	Holm
10:00-10:30	Case Study: Bidwell Mansion Interpretation Master Plan	Bossarte
10:30-11:00	Framing the Interpretive Direction: Interpretive Periods	Holm
11:00-12:00	Identifying Goals, Objectives, and Related Strategies for Interpretation Plans	Holm/Wilson
1200-1300	Lunch	
1300-1530	Developing Goals, Objectives, Strategies, and Tasks	Holm/Wilson
1530-1600	Evaluation in the Planning Process	Holm
1600-1700	Finalizing an Interpretive Plan	Wilson

Thursday

September 28

Implementation of Interpretive Planning

0800-0900	Interpretive Plan Scramble	Holm
0900-1000	Implementation of Interpretive Plans	Wilson
1000-1100	Case Study: Angel Island Interpretation Master Plan	Dexter-Lee
1100-1200	Conclusion / Question and Answer	All

STRATEGIC PLANNING FOR INTERPRETATION

HOURS

PROGRAM OUTLINE

Welcome to Strategic Planning for Interpretation (SP4I).....	1
Interpretation Planning Basics.....	7
Role of Planning: Big Picture	
Identifying Existing Planning Documents	
Identifying Planning Needs: Part One	
Case Study: Fort Ord Interpretation Master Plan	
Identifying Planning Needs: Part Two	
Assembling your Team	
Getting Started on your Planning Journey	
Assessing Existing Conditions	8
Identifying Your Audience	
Involving Stakeholders	
Consulting with Native Americans	
Assessing Existing Interpretation	
Case Study: Anza Borrego Interpretation Master Plan	
Developing Interpretive Improvements.....	8
Framing the Interpretive Direction: Periods and Themes	
Case Study: Bidwell Mansion Interpretation Master Plan	
Identifying Goals, Objectives, and Related Strategies for Interpretation Plans	
Developing Goals, Objectives, Strategies, and Tasks	
Evaluation during Planning	
Finalizing an Interpretive Plan	
Implementation of Interpretive Planning.....	4
Implementation of Interpretation Plans	
Interpretive Plan Scramble: Information Application	
Case Study: Angel Island Interpretation Master Plan	
Conclusion / Question and Answer	
TOTAL HOURS.....	28

STRATEGIC PLANNING FOR INTERPRETATION (SP4I)

PURPOSE AND OBJECTIVES

WELCOME TO STRATEGIC PLANNING FOR INTERPRETATION (SP4I)

Purpose: The purpose of this course is to welcome and orient participants to the Strategic Planning for Interpretation (SP4I) training and provide an overview of interpretation planning.

Performance Objectives: By the end of this course participants will

1. Use the training syllabus to locate the training agenda, course descriptions, and related performance objectives.
2. Express their experience with planning.
3. Identify what is interpretation planning and the different types of plans.

ROLE OF PLANNING: BIG PICTURE

Purpose: The purpose of this course is to acquaint participants with the importance of interpretive planning, its benefits, and the Department's changing views on planning.

Performance Objectives: By the end of this course participants will

1. Identify the benefits of interpretation planning.
2. Explain the correlation between interpretation planning and funding.
3. Discuss how recent legislation affects the Department's use of management plans.

IDENTIFYING EXISTING PLANNING DOCUMENTS

Purpose: The purpose of this course is to engage participants in gathering information during the research phase of planning, including using materials from the pre-training assignment and the Department's Unit Data File (UDF).

Performance Objectives: By the end of this course participants will

1. Identify the steps needed to complete a search of planning documents for their park.

STRATEGIC PLANNING FOR INTERPRETATION (SP4I)

2. Evaluate the status of documents (current, out-of-date, etc.) located on the UDF.
3. Compare planning documents located on the UDF with items located through other sources.

IDENTIFYING PLANNING NEEDS

Purpose: The purpose of this course is to give participants the skills to determine if and what type of interpretation plan is needed, and to match interpretive projects in PID with planning efforts.

Performance Objectives: By the end of this course participants will

1. Identify five things to consider before beginning an interpretation plan.
2. Discuss how the funding source can affect interpretation planning.
3. Identify steps need to update their park or district PID list to include interpretation planning.

ASSEMBLING YOUR TEAM

Purpose: The purpose of this course is to familiarize participants with individuals involved in developing and implementing the various interpretation plans.

Performance Objectives: By the end of this course participants will

1. Identify staff, management, and park partners involved in developing and implementing a plan.
2. Describe the role that staff, management, and park partners will have during the planning process.

GETTING STARTED ON YOUR PLANNING JOURNEY

Purpose: The purpose of this course is to provide participants with the key steps needed to begin the planning process for their park or district.

Performance Objectives: By the end of the course participants will

STRATEGIC PLANNING FOR INTERPRETATION (SP4I)

1. Compare the benefits of a plan being developed by a contractor, service center staff, or in-house within a district.
2. Create a projected timeline with key milestones for their proposed plan.

IDENTIFYING YOUR AUDIENCE AND INVOLVING STAKEHOLDERS

Purpose: The purpose of this course is to provide participants with resources and methods for identifying park visitors and target audiences. And gather input from stakeholders through informal meetings to organizing workshops and focus groups.

Performance Objectives: By the end of the course participants will

1. List the sources of demographic and visitor data appropriate for their plan.
2. Identify what additional information is needed about current visitors and potential audience for their plan.
3. Identify the tools and techniques needed to organize stakeholder workshops as part of interpretation planning.
4. Describe methods of consulting with Native American tribal groups during the planning process.

ASSESSING EXISTING INTERPRETATION

Purpose: The purpose of this course is to acquaint participants with methods of gathering information during the research phase of planning, including existing interpretation. The focus will be on non-personal interpretation such as facilities and media, and personal interpretation including programs and events. Related interpretation provided by concessionaires and cooperating associations will also be discussed.

Performance Objectives: By the end of this course participants will

1. Use a variety of tools (e.g., checklists, forms, etc.) to assess the existing condition of interpretive facilities and related media.
2. Analyze the team approach when assessing interpretive facilities and media.

STRATEGIC PLANNING FOR INTERPRETATION (SP4I)

3. Identify resources available to assess the status of programs and events at your park (CAMP, park webpage, planning checklists, special events coordinator, etc.)
4. List the existing interpretive programs in their park/sector/district.
5. List other outside organizations providing similar programs.
6. Discuss the types of interpretive support that are provided by concessionaires and cooperating associations.

FRAMING THE INTERPRETIVE DIRECTION

Purpose: The purpose of this course is to prepare participants for identifying interpretive periods, themes, and relevant academic content standards.

Performance Objectives: By the end of this course participants will

1. List existing interpretive periods and themes in previous planning documents.
2. Write at least one interpretive theme.

IDENTIFYING GOALS, OBJECTIVES, STRATEGIES AND TASKS

Purpose: The purpose of this course is to teach participants the definitions and hierarchy of goals, objectives, and related strategies for interpretive plans; acquaint them with where to locate goals, objectives and strategies, if previously developed; and, instruct them on how to write goals, objectives, strategies and tasks if not previously developed.

Performance Objectives: By the end of this course participants will

1. Define goals, objectives, strategies, and tasks.
2. Identify sources for previously developed interpretation goals, objectives, and strategies.
3. Write at least one goal, objective, strategy and task.

STRATEGIC PLANNING FOR INTERPRETATION (SP4I)

FINALIZING AN INTERPRETATION PLAN

Purpose: The purpose of this course is to acquaint participants with how to incorporate evaluation in the planning process, the final steps in the planning process, and how to implement an interpretation plan.

Performance Objectives: By the end of this course participants will

1. Discuss when and how evaluation is used in the planning process.
2. Update their projected timeline and milestones, as required.
3. Determine the final planning elements to include in their proposed plan.
4. Describe methods for implementing an interpretation plan.

INTERPRETATION MASTER PLAN CASE STUDIES

Purpose: The purpose of this course is to introduce participants to the Interpretation Master Plan (IMP), a management plan that can give structure and direction to their overall interpretation program. Four IMPs will be presented as case studies.

Performance Objectives: By the end of this course participants will

1. Review the pros and cons of having an interpretation plan written by a contractor, a service center, or in-house.
2. Discuss best practices and lessons learned in interpretation planning.
3. Identify different methods for implementing interpretation plan components.

Training Center, 837 Asilomar Blvd., Pacific Grove, CA 93950

