

## Showcasing Your Piece of History

### INTERPRETIVE MASTER PLANNING

by Alice Parman

#### **A Shared Vision**

Each year, a surprising number of ideas for brand-new museums are seriously entertained throughout the United States, often by people with experience in business and government who have at least some idea of what they might be getting into. What motivates a group of "movers and shakers" to pursue the highly ambitious and rather daunting goal of creating a new nonprofit educational institution from whole cloth? The answer varies, but it is unerringly driven by a shared vision for the finished product.

In the case of the National Steinbeck Center, which opens in July, 1998 in John Steinbeck's home town, the desire to create a major tourist attraction was an important factor. Salinas, California is just 30 minutes from the Monterey Bay Aquarium, visited annually by more than a million people. There is every reason for Salinas to share some of these visitors when the new Steinbeck Center opens. What an economic boon that would be for the city's historically interesting downtown.

With exceptional foresight, visionary public librarian John Gross had long since persuaded the city of Salinas to name its library after John Steinbeck, and had put together a nationally significant collection of Steinbeck books and memorabilia. Thanks to acquisitions and donations through the years, the collection now includes many rare and valuable artifacts related to the Nobel Prize winner.

John Steinbeck was not always a local hero. *The Grapes of Wrath* alienated California growers, and on at least two occasions, copies of the novel were publicly burned in Salinas. But since Steinbeck's death in 1968, his name and face have proliferated, not just in Salinas, but in nearby Monterey and Pacific Grove as well.

On Main Street in Salinas, a small office currently serves as the Steinbeck Center. This office has attracted Steinbeck lovers from all parts of the nation and the world. Their pilgrimage to Salinas includes visits to the house where John was born and grew up, the cemetery where he is buried, and numerous other sites associated with his life and works.

Inspired by this widespread, persistent interest in Salinas' native son, the board and staff of the Steinbeck Center Foundation brought in a top team of professional consultants to develop a museum that would attract people of all ages and backgrounds. The museum they envisioned would provide an unforgettable and rewarding experience that would motivate visitors to *read*—not only Steinbeck's works, but creative literature in general.

## **Facing Challenges, Avoiding Pitfalls**

Well-known examples of new museum projects that have failed to materialize, or that have been unable to keep their doors open, served as cautionary tales to the Steinbeck Center Foundation board. Institutional planning consultants put together conservative recommendations for project scope and goals, as well as projections of staffing levels and operating costs, based on a study of regional trends and comparable attractions.

Together with Portland-based architects Thompson Vaivoda & Associates, exhibit designers Formations Inc. undertook an extensive interpretive master plan for the Steinbeck Center Foundation.

Formations then completed design and fabrication of an 8500 square foot core exhibit, *Journey Through Steinbeck's Valley of the World*. An open planning and design process welcomed critique and ideas from all points of view. The planners and designers worked with the Steinbeck Center's exhibit committee and advisory groups, and received feedback from focus groups facilitated by a consulting evaluator.

The exhibit uses multiple voices and diverse exhibit methods to introduce visitors to the many worlds portrayed in Steinbeck's writings. Layers of in-depth information reward Steinbeck aficionados, while engaging low-tech interactives involve children and their families in conversation and discovery.

The architects designed a striking building; and despite initial controversy, the structure has won widespread acceptance.

The planning consultants developed a facilities plan and fundraising strategy that pointed the way toward contributions totaling \$9 million.

## **Interpretive Master Planning: a rewarding first step**

There's nothing mystical about the process of interpretive master planning, but its results can be transformative. As practiced by Formations, the process typically takes four to nine months, depending on the size and complexity of the proposed project. During this time, the museum and the core exhibits, as visitors will experience them, take shape in the minds of the planning committee and the institution's board of directors. The stage is being set for the fundraising and marketing efforts that will enable the new (or renewed) museum to play a successful role as one of its region's important cultural attractions.

Typically, Formations' president and design director, Craig Kerger, and senior exhibit planner/writer Alice Parman team up to facilitate a series of meetings with individuals who are central to the project. During this phase, Formations gains knowledge from regional planners, scholars, historians, museum professionals, and community leaders and advisors.

In a focused but lively and creative discussion, the exhibit's main messages are identified; this consensus-building process is driven by the institutional mission. The planning committee is critical to project success; as a general rule, the more diverse and inclusive the group, the more workable and persuasive the final plan will be.

Once the group is enthusiastically committed to a few key "take-home" messages, they can identify important concepts, values, and facts to be conveyed by the exhibits. Thinking about current and target audiences, the planning committee takes note of misconceptions and stereotypes to be corrected, and begins to describe the look and feel of the visitor experience.

Throughout the planning process, the Formations team develops benchmark documents to focus and formalize client reviews. First, a meeting summary is distributed to make sure everyone agrees on what was said. After noting any corrections, Parman and Kerger generate a written overview of visitor experiences in the imagined new or renovated museum, including a narrative walkthrough of exhibits. This document is reviewed by the exhibit committee in rough form, and revised until it meets with universal enthusiasm. Then a schematic floor plan and concept sketches are created, adding a visual dimension. Again, corrections are made, and the entire package is fine tuned.

Clients are encouraged to use focus groups and other data-gathering methods in order to elicit a broad response from actual and potential visitors. At the conclusion of the planning process, a target budget is formulated.

The finished product is an interpretive master plan that is graphically appealing, persuasively written, and compelling—an invaluable tool for fundraising and building community support. Now it is up to the board, the museum's professional staff, and their institutional planning consultants to map out and complete a successful fundraising campaign, map out the museum's financial strategy for sustainability, and attract a commensurate audience through effective marketing.

Can your institution do interpretive master planning in-house? In the case of larger, established museums with professionally trained staff, the answer may be yes; but for the vast majority of startup and "reinvention" projects, the planning process is not really feasible without outside consultation. Responsible and experienced consultants will serve as guides and coaches to your planning committee, alerting you to potential hazards and helping you make the most of your resources. The best exhibit design firms are known for the diversity of their interpretive strategies and their designs.

Consider contracting with a firm whose principals are directly involved in every project, and whose staff is experienced and capable in all phases of exhibit development. When a consistent set of consulting professionals work with you to plan, design, build, and install the new exhibits, the learning curve accelerates, and working relationships become friendships.

### **Ingredients for Success**

As in the business world, not every dream becomes a reality, and not every reality can stay the course. Without certain key ingredients, museum and visitor center startups are unlikely to attain long-term success. With them, and with realistic and responsible institutional planning and consultation, they have a good chance to thrive.

- **Vision.** A key person must be willing and able to champion the project, whether visibly or behind the scenes. That person is the driving force behind an all-out effort. A personable style, openness to collaboration, and boundless energy are qualities that can attract key community leaders and significant donations to your initiative.

As an example, a longtime Salinas resident with an enviable track record as a fundraiser took on the National Steinbeck Center project as a volunteer. In partnership with a member of a well-known Salinas family, he orchestrated solicitations and events that raised many millions of dollars for the project.

- **A committed board.** The Steinbeck Center's board chair voluntarily took over management of the Center's day-to-day affairs during an interim period, enabling the Center to keep its doors open while focusing resources and energy on fundraising. Strong support from board members is vital.

- **Community support.** In one of the National Steinbeck Center's most ingenious approaches to fundraising, the committee received a donation of a small house in Carmel, and organized a raffle. By selling chances to win the house, they were able to raise a substantial figure, which was contributed to the Center.

- **Seed money.** This can be raised from a variety of sources. One of Formations' clients received a substantial planning grant from the state, plus a startup donation of \$100,000 from a local business leader. Key donations for the National Steinbeck Center came from leading California foundations and local philanthropists. With intelligent planning and a will...there's a way.

- **Persistence.** New projects are often controversial, especially in communities where economic dislocation or rapid growth have led to repeated efforts to save the downtown or recharge the economy. Successful projects build on past efforts, emulating their strengths and learning from their mistakes.

An inclusive, open planning process is essential. To succeed, a museum project must ally itself in a mutually respectful way with other community-building efforts, creating a special role that fits the hopes, expectations, and needs of a broad cross-section of citizens and organizations. Controversy is inevitable, and usually, it's a good sign. It shows that people care.

- **Effective, caring professional consultation.** Selection of the exhibit planning/design firm and project architect are key steps to fulfillment of project goals. When choosing these and other professionals who will guide your planning and implementation process, look for experience that matches your scope of work and subject matter. For example, if you select a local architect who has never designed a museum, it becomes even more important to choose an exhibit design firm with a substantial track record in interpretive master planning. Working together, the exhibit planners and the architect will create a new or renovated building that works for both visitors and staff.

An experienced interpretive master planning firm can save your museum both time and money. For the planning committee, master planning is an immensely rewarding activity that helps to clarify and formalize a vision that can then be shared with community members and funders. Like matrimony, interpretive master planning is not a state to be entered upon lightly; but with thoughtfulness, energy, and commitment, the results can transform your institution's future.

Formations Inc. is a full-service master planning, exhibit design, fabrication, and installation firm headquartered in Portland, Oregon. Formations' award-winning teams include many nationally renowned design professionals.

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