

2014 Annual Report

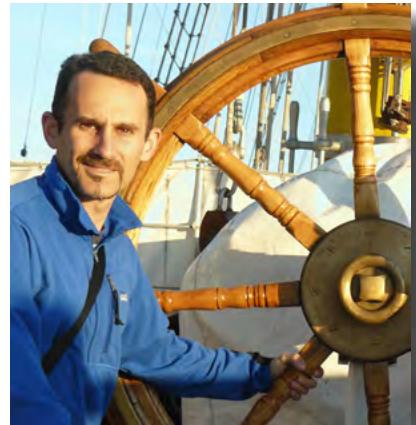


PUP Consortium used participatory interpretation to help create the initial site design for America's newest urban National Wildlife Refuge, Valle de Oro, Albuquerque, New Mexico, USA. Here, the sun sets on the old dairy farm, only to rise on a wildlife refuge, soon to be transformed into a gallery of habitats found in the Rio Grande area.



Words from Jon Kohl

Founder and Coordinating Facilitator
jon@pupconsortium.net



Experience from the community development and social entrepreneurship fields shows that emerging organizations that start with no money, evolve slowly through trial and error, don't overplan or bureaucratize, don't concern themselves too much with defining evaluation criteria, have a much better chance of long-term survival than organizations that start with a flush of money and rigid, formal planning. The PUP Process and manual have been evolving for 15 years through trial and error in cultures and languages around the world, and now transitions into the PUP Global Heritage Consortium at the beginning of 2013.

That year, we got together founding members, did a lot of thinking about what the Consortium should be and started a few projects under the new concept: a global, virtual, non-incorporated, multi-sectoral, non-profit network of diversified membership and income aimed at replacing the aging conventional paradigm in heritage management that leaves so many management plans unimplemented on shelves, wasting untold human, financial, time, and trust resources that could have been better used for conservation. We occupy the unique niche of helping heritage agencies and communities to evolve into 21st Century management approaches that are more adaptive, holistic, integrated, sensitive, and diversified than ever before.

In 2014, we focused on developing basic operating infrastructure as well as refining the vision. We began building our website, established a financial management system, expanded our membership, consolidated our Heritage Interpretive Development Program, had our book that explains the theory behind PUP accepted for publication by Fulcrum Publishing, designed the PUP facilitator certification program, developed more marketing materials in different languages, and other elements that will allow us to work together in 2015. We did that without any bureaucracy or overhead costs. Now we are ready to reach out this year and create our general membership program for regular citizens around the world who support the cause of improving heritage management through non-conventional, more holistic means. This year we hope to increase the tempo of our projects and roll out some new initiatives around the world. I am happy to present our Second Annual Report. For anyone who missed our first, please find it here on our new website <http://pupconsortium.net/the-pup-global-heritage-consortium/annual-reports>.

Words from Dr. Stephen F. McCool

Professor Emeritus, University of Montana
PUP Consortium Advisor



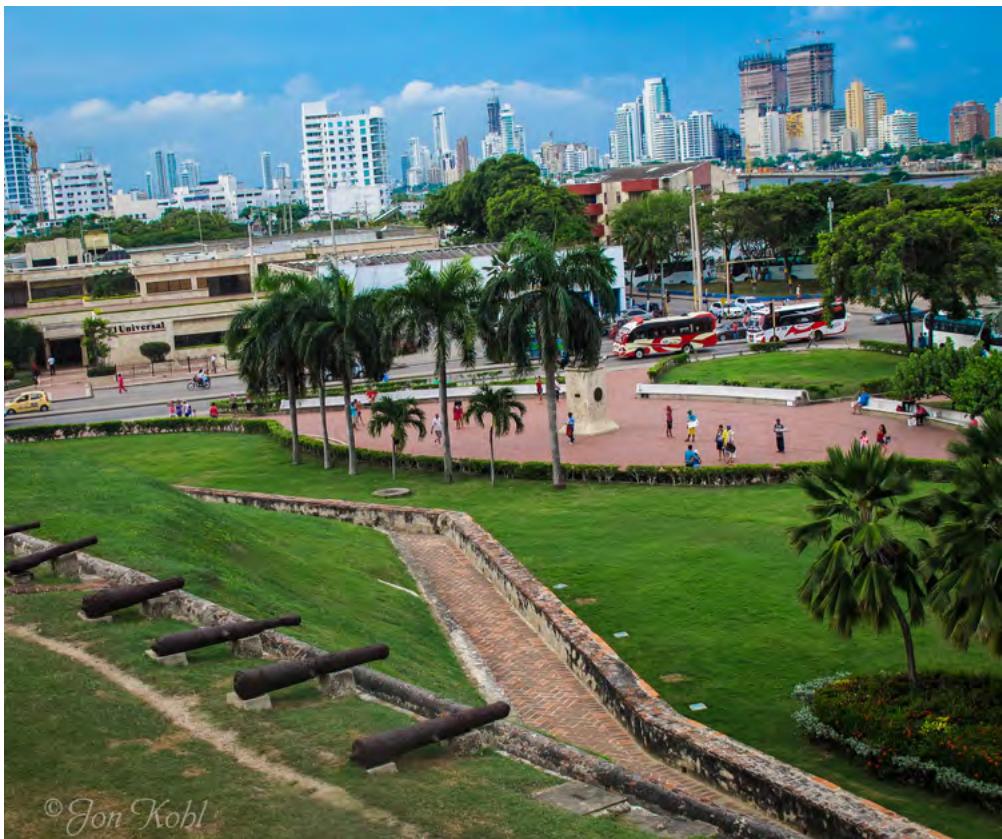
What does it take to effectively manage our natural heritage? A question of immense importance facing the 6,000 delegates to the World Parks Congress held last November in Sydney, Australia. As one of those delegates, I sensed a tangible urgency and concern about not only how to protect heritage in light of growing visitor use but also in providing opportunities for high-quality visitor experiences that underlie many economic development schemes. Managing heritage, particularly concerning all of the demands on that heritage even within designated national parks is neither simple nor painless, a conclusion I made because of the lack of effective management reported by the World Conservation Monitoring Center during the Congress — only 29% of the globe's 209,000 protected areas receive effective management.

No wonder many managers attending the Congress were searching for help in managing public, tourism, and visitor use, just what the PUP Consortium provides, a framework and philosophy that focuses on plan implementation rather than construction of documents. And the need for help is great: At the same time many at the Congress worried about the low level of effective management, others called for greater engagement of civil society in parks and protected areas, through visitation, citizen science, and other means in building greater political support.

In a very real sense, this appeal means greater levels of visitation and public use and the consequent demands for infrastructure and programs. But such engagement requires both visitor use planning and management, activities informed by best practices, various forms of knowledge, and civil society itself. The gap between these demands and the ability of protected area managers to deliver at the global level is enormous and alarming. The PUP Consortium plays important roles in enhancing management through its innovative and holistic approach, its emphasis on planning as capacity building, and its philosophy of working with park planners to support them rather than writing plans for them.

Building confidence is critical to decision-making, and the PUP Consortium does this through its role in supporting a community of practice. In this report, the PUP Consortium reports on its activities and how they lead to plans that are “owned” by managers and affected constituencies. Such ownership and understanding of plans are prerequisites to effective management.

Forewords	2
Updated Vision	5
Projects in 2014	7
Membership	11
Organizational Development	12
Lessons Learned Center	14
Financial Position	15
Outreach & Media	16
Lessons Learned	18
Priorities for 2015	20



World Heritage Site Cartagena, Colombia, seen from the Castle San Felipe de Barajas where PUP offered interpretive training as well as co-designed an interpretive course with the National Training Institute and National Parks of Colombia.

As the PUP Consortium matures it continues to hone its vision. Here is the latest version of our vision and mission statements as found on our website.

Slogan

Emerging paradigms in heritage management and planning

Mission

The PUP Global Heritage Consortium unites people and organizations dedicated to introducing emerging paradigms about management and planning into the heritage management field in order to stem the tide of non-implemented natural and cultural heritage management plans and transition to a more holistic, Integral management approach. Ultimately this approach improves the conservation of biological and cultural diversity.

Short Vision

The PUP Global Heritage Consortium and its distributed global learning network will transform the planning and management paradigm in the heritage management world from conventional Technical Rationality to Holistic Planning and then become the go-to reference. With this new paradigm, the heritage field will better conserve the world's biological and cultural diversity.

Vision of the World We Live In

Conventional heritage planning and management still exists in the PLUS World — Predictable, Linear, Understandable, and Stable. But the real world is DICE — Dynamic, Impossible to completely understand, Complex, and Ever-changing or evolving. Today's accelerating change and uncertainty quickly outdate many conventional natural and cultural heritage management assumptions and tools, requiring a new story and paradigm in the heritage management field, including new mindsets and intentions, skills and behaviors, values and cultures, and social technologies and systems. To conserve biological and cultural diversity, the field needs a renaissance.

Vision of the Consortium that We Are Creating

The PUP Global Heritage Consortium works at the leading edge of change for this new paradigm by integrating emerging paradigms from other fields into our own. We facilitate the transformation of the Technical Rationality (conventional) paradigm into a more holistic and Integral approach and thus become the go-to reference for the new paradigm in the natural and cultural heritage world, complementing the formal policy functions of the world's three principal heritage organizations: UNESCO World Heritage Center, IUCN, and ICOMOS.

The PUP Consortium is a non-incorporated, multi-sectorial, virtual, global alliance. Our horizontal, dispersed, and resilient organizational structure allows us to change quickly as the world does. We build ourselves around a virtual Lessons Learned Center that validates, stores, disseminates, and encourages reuse of lessons learned based on field and academic experiences collected by our semi-autonomous Regional Learning Platforms around the world. It integrates lessons learned into our training materials and disseminates them through publications, trainings, educational materials, conferences, field projects, and other means all directed to transforming the global mindset about managing heritage, natural and cultural.

Our behavior and form demonstrate what we preach: we follow the core principles of Authenticity, Transparency, Fairness, and Trust as well as the principles of Holistic Planning; we use an adaptive learning structure

and culture; diversified revenue streams; strong and diverse membership to leverage our message; long-term relationships with members and partners; and we continually updates our materials in the marketplace of ideas. We can never be satisfied until we become outdated ourselves by the new paradigm.

Vision of the Tipping Point We Seek

The Consortium will work with small and large, public and private, non-profit and for-profit organizations and individuals interested in heritage to change the field's management story. We especially hold as our principal measure of success that the three principal heritage organizations formally declare a transition to a new emerging paradigm or story (the tipping point), one hopefully that resembles the Consortium's view of Holistic Planning. To get there we will ally with them and others to offer and continuously improve performance-building programs in the new paradigm. On the ground, we introduce an expanded Integral notion of implementation which most sites will adopt to avoid their plans ending on shelves unimplemented.

Expanding the PUP Process to Include Community

During most of the PUP Process's development over the past 15 years, we have focused on refining, honing, and experimenting with the 11 modules that over 8–12 months lead to a public use plan. In the past two years, however, we have shifted focus to the stage that comes before these participatory conversations. This development rests on the assumption that a constituent community must first have a minimal level of trust, alignment of objectives, cooperation, and knowing each other in order to enter a planning process. Otherwise conflict and mistrust will reduce a planning process to a mere academic exercise, never to be implemented by participants who do not trust the hidden agendas of other actors or trust that they will do what they say they will do. They feel no shared ownership, no common bond, or a set of rules on how to engage each other in a civil, respectful, constructive manner.

So our process increasingly looks to work with the community of interested actors before entering the more structured planning process. This work might involve mediating conflicts, holding simultaneous vision workshops, training in dialogue skills, or simply helping actors to get to know each other and each other's interests. We call this community cultivation. As a result of this emphasis we have developed the Exploratory Trip approach (see below), redesigned Module 1, added Integral Theory to the Trip as well as different forms of site assessment, and are discussing with our partners especially the Consensus Building Institute how to incorporate conflict management to this process.

This community cultivation goes way beyond the often superficial discussions of community participation and community-based conservation so often heard in conservation discourse. Our emphasis derives more from the grassroots and community development fields.



A local guide interpreted the Piedras de Tunjo Arqueological Park (Factatativa, Colombia) during the Exploratory Trip. The community comes right up to the boundary of the property.

World Heritage City of Évora, Portugal

Starting in 2012, Nuno Domingos has slowly moved this magnificent city (including a megalithic site on its outskirts, see right) through the PUP Process. Initial funding came from Turismo de Portugal in 2012 as part of a larger project for World Heritage Sites of Portuguese Origin and Influence. When that funding ended that year, Nuno, who is now a PUP Facilitator, continued working with the Consortium through the financial and political distractions of 2013 and into 2014. Unfortunately for PUP and Nuno, the mayor lost the elections and with the Communist Party takeover, Nuno lost his job and PUP lost support in Evora. Nuno returned to his heritage home city of Santarém as director of its historic center where he hopes to launch a PUP Process in 2015.



Valle de Oro National Wildlife Refuge, Albuquerque, New Mexico

The PUP Consortium allied with Great Outdoors Consultants to work with the US Fish & Wildlife Service's newest refuge in south Albuquerque. Situated in an economically depressed and environmentally abused part of the city, the refuge emerged from community demand which feared the conversion of the last open green space into another industrial brownfield. The first refuge manager, Jennifer Owen-White, was hired because of her potential to lead a diverse community-based effort to create this 560-acre refuge from a hay field (see cover photo). The Refuge contracted us to forge community-based interpretive messages and an initial site plan based on interpretation. What has resulted is most likely the most participatory set of interpretive messages ever created as well as a protected area whose initial design strongly depended on its interpretive value, something that almost never occurs. We are proud to be involved in first urban refuge to meet all the Urban Refuge Standards of Excellence and a site that has pushed the envelope for community involvement for a federally protected area. This contract ends in February 2015.



World Heritage Site Phong Nha Ke Bang National Parks, Vietnam

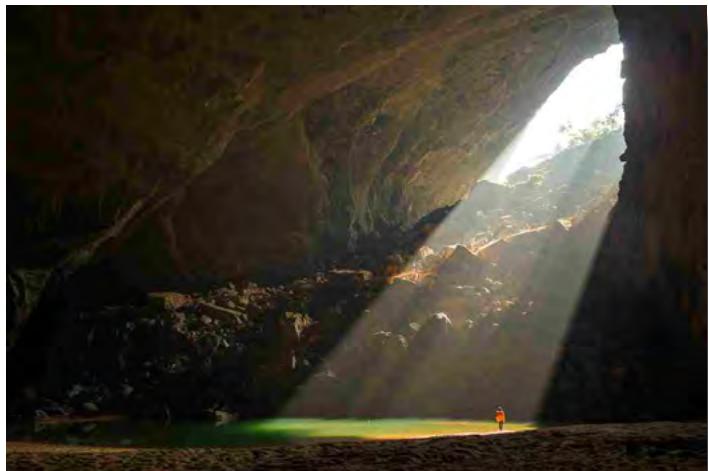
After successfully completing the PUP Consortium's first exploratory trip in 2013, the national park, the PUP Consortium, and the German Government (KfW) decided to launch a full PUP which is a first in several areas:

1. First PUP since the PUP Consortium became an independent organization
2. First PUP based on an exploratory trip
3. First PUP to use our organizational structure of projects being managed through our formal partners. In this case ETE, one of our core founding members, managed the exploratory trip and will play a more

active part in the technical side as well as administrative side of the PUP.

4. First time that PUP allies as a partner with UNESCO rather than a contractor of UNESCO. Half the project responsibilities and budget will go to UNESCO-Hanoi where our PUP Facilitators are employed and the other half will go directly to the PUP Consortium.

Due to administrative difficulties and a political conflict about a proposed cable car in the nuclear zone, the project has been delayed to 2015. Photo, Son Doong Cave, by Ryan Deboodt for Oxalis Adventur Tours. Used with permission.



4E Alliance in Colombia

The PUP Consortium has tentatively allied with the Colombian environmental education and training NGO OpEPA (www.opepa.org) and the non-profit Corporación Clorofila Urbana (www.clorofilaurbana.org) to form the 4E Alliance. It promotes training in public use related themes. While undergoing development, it initiated and completed its first project. See below. 2015 should see its fuller development as well as new projects in Colombia.



Nature-based Tourism Good Practices Guides, Colombia

The 4E Alliance received financing from the Ministry of Commerce, Industry, and Tourism (Programa de Transformación Productiva) to produce a series of mini-guides of “Good Practices in Nature Tourism” (image, p. 8). The illustrated guides are principally for small restaurants, tour guides, accommodations, and travel agents on how they can make their practices more sustainable. Jon Kohl was part of the editorial committee while Carlos Rosero was one of the writers. The Ministry has financed various workshops with local tourism providers in the use of the guides. The guides can be found at www.ptp.com.co/contenido/contenido.aspx?conID=601&catID=643.

Seminal Book: The Future Has Other Plans

The Consortium’s Jon Kohl and Steve McCool completed their book, *The Future Has Other Plans: Journey from Conventional to Holistic Planning in Natural and Cultural Heritage Sites*, which was accepted by Fulcrum Publishing (www.fulcrum-books.com) for publication in January 2016. The book to be co-sponsored by the PUP Consortium goes much deeper into the theory and literature that underpins the PUP Process and will be required reading for all PUP Facilitators. The back-of-book blurb is tentatively the following:

Why do so many natural and cultural protected sites spend ever more dollars, hours, and expectations on plans soon shipwrecked and unimplemented? In *The Future Has Other Plans*, global heritage management experts Jon Kohl and Steve McCool dive with readers far below knee-jerk explanations such as “lack of money, time, personnel, and information” to illuminate deep causes lurking in planners’ very notion of their discipline. This revolutionary book explores plan implementation failures and successes, and through interdisciplinary case stories from around the world, it challenges conventional planning and guide readers toward paradigms emerging in fields beyond heritage. Drawing on decades of practical experience, Kohl and McCool discover outside-the-box tools and strategies such as High Reliability Organizing, Mutual Gains Approach, and Integral Theory. They then resurface with a holistic framework for building and implementing a new species of plan in a complex, contentious world. The Work will be a part of Fulcrum’s Applied Communication Series, Edited by Sam Ham.

We plan for early 2015 to write a short White Paper that summarizes the basic argument useful while PUP Consortium awaits final publication.

Interpretive Planning Workshops in Spain

In March Jon Kohl traveled to Spain where he gave a full-day workshop for the annual meeting of the Asociación para la Interpretación de Patrimonio (www.interpretaciondelpatrimonio.org). He also offered a four-day workshop for Spanish National Parks in association with Fernando Ramos who later became the PUP Facilitator in Spain (both are pictured backs to camera in foreground). Finally Jon and Fernando offered a day-long workshop in Santiago de Compostela for the tourism community there. The workshops have become the basis for an upcoming course in interpretive planning for the Consortium. A publication based on the National Parks workshop is forthcoming in 2015.



PUP Teams up with Colombia's National Training Service and National Parks

In Colombia, all tourism guides must be trained and certified by the Servicio Nacional de Aprendizaje (SENA) (www.sena.edu.co). SENA then is largely responsible for the quality and capacity of guiding in that country. Responding to recent criticisms of tour guide quality, SENA has decided that interpretation is the single best way to improve quality. As such SENA in collaboration with Colombian National Parks invited Jon Kohl to design the curriculum for a train-the-trainers course to train the best tour guide instructors in interpretation. While visiting Colombia, Jon gave a teleconference interpreting interpretation transmitted to 14 training centers around the country (photo below) as well as workshops on interpretive message writing (Cartagena) and tour program structure and design (Facatativá). In 2015 SENA, National Parks, and the PUP Consortium (especially its founding core member, CATIE) will discuss an agreement to produce the course as well as other exciting ideas to improve interpretation instruction in one of the field's upcoming powers.



Jon Kohl interprets heritage interpretation for tourism guides and students of guiding at 14 National Training Service training centers across Colombia (see on TV screen in the back). Here he introduces the concept that interpretation should be EROTIC, that is, it is **E**ntertaining, **R**elevant, **O**rganized, and **T**hematic. The talk was sponsored by the Service (SENA) and the National Parks of Colombia. Two of the volunteers wear the Parks's characteristic blue uniforms. Photo by Clara Osorio.

In 2014 we several added members with more for 2015. Furthermore we will open the general membership category for people who generally support our mission but will not participate directly in our projects.

Core Members

Our three founding core members remained since the outset CATIE's Program for Protected Areas and Biological Corridors (Costa Rica) represented by Dr. Bernal Herrera, the Consensus Building Institute (USA) represented by Stacie Smith, and Ecological Tourism in Europe (Germany) represented by Michael Meyer and Bernd Räth.



Advisors

While one advisor resigned from his post, we added two additional advisors including Duane Fast and Marisol Mayorga (for the Heritage Interpretation Development Program) (their photos to right).

We also have Art Pedersen and Dr. Stephen McCool. See <http://pup-consortium.net/the-pup-network/>



A SYSTEMS APPROACH TO SUSTAINABILITY



Technical Service Members

Arcraft Display Graphics resigned when its CEO, Duane Fast, retired from the company after 30 years. Duane then became an advisor. The Donella Meadows Institute, led by executive director Marta Ceroni (holding "Beyond GDP" sign on annual report cover), entered the Consortium (www.donellameadows.org). DMI will contribute systems thinking and sustainability to the PUP portfolio of skill and knowledge areas. Ecobiosfera, an NGO that helps parks in Chiapas, Mexico develop sustainable tourism programs, has also joined the Consortium under the leadership of Claudia Virgen who first met PUP years ago when we all worked at RARE.

Facilitators

The PUP Consortium consolidated its corps of PUP facilitators. Each facilitator is the liaison in his or her country as well as the point person for activities there. We have facilitators for Colombia, Guatemala/Grenada, Honduras, Indonesia, Portugal, Spain, Vietnam, and one at large facilitator based in Finland. One facilitator in Vietnam left to pursue a PhD in Australia. She was replaced by a UNESCO culture officer based in Hanoi.



Financial System Set Up

As a non-incorporated organization with no physical address in any country, the PUP Consortium cannot open a bank account in its own name. Our solution was to open a Paypal account registered in Costa Rica. It is a business account registered in the name of Jon Kohl and linked to personal accounts in Costa Rica and the United States. Despite registration in this manner, no personal monies pass through or exist in the PUP account and likewise no PUP funds reside in any personal account. The Consortium, moreover, took numerous measures to ensure transparency including giving review privileges to all three core members, putting an updated register of transactions available at all times to all organizational members, copies of all receipts also available to everyone, and a year-end financial statement included in this report. Paypal can receive credit card payments and Paypal transfers from anywhere in the world, with no minimal number of transactions, making it ideal for a small global network. The account maintains balances in US dollars and euros.

PUP Consortium Website

While PUP had a website since its beginning in 2013, in the second semester of 2014, we hired a design firm in Costa Rica originally established by our TSM Solimar International and we opened an account on Hostgator to host the site. By the end of the year, the basic site was live but still under development. In 2015, we will add general membership functionality including online signup and member services.



Interpretive Heritage Development Program

In 2014 the Consortium has consolidated its first complete program related to public use, the Interpretive Heritage Development Program. The Program offers a variety of heritage interpretation development services. It operates along a set of Performance and Training Principles. The Program has two advisors, three instructors, and an assistant instructor. It can offer a variety of capacity building programs related to interpretation and heritage site management. See <http://pupconsortium.net/the-pup-network/heritage-interpretive-development-program>.

The principles are based on the desire to promote true development, not just sell services to make money. These principles are researched and based on the principles of adult education, community development, and other holistic sources. Find the principles at

<http://pupconsortium.net/wp-content/uploads/2014/10/Training-and-Performance-Building-Principles-of-the-PUP-Consortium-Draft.pdf>

A screenshot of the Interpretive Heritage Development Program page. The top left features the PUP logo and the tagline "Emerging paradigms for heritage planning and management". The top right features the title "Heritage Interpretive Development Program" and a brief description: "The Heritage Interpretive Development Program Develops Heritage Interpretation Management Performance of Natural and Cultural Heritage." Below the title is a row of four images showing various heritage sites: a church in a forest, a coastal rock formation, a snowy mountain range, and a historic city street. At the bottom left is a small note: "World Heritage Sites where PUP has influenced public use planning: Llorente Ki in Chile, Ohrid, Macedonia, Komodo National Park, Indonesia, Durmitor National Park, Montenegro; Historic city of Evora, Portugal". At the bottom right are logos for CATIE, CBI, and ÖIE.

Draft Manual for Exploratory Trips

As the Exploratory Trip has been an increasingly important step in site recruitment, we have been developing a manual for how to carry it out. Though by the end of 2014, it was still in draft form, it will be published in 2015.

Updates to the PUP Manual

In 2014 we see whole-scale updates to Modules 1 and 2 with minor changes throughout the manual. The document is continuously updated and will be available online for free registration in 2015. The PUP Manual is the central feature of the PUP Process now in its 15th year of development.

General Publicity Materials

The Consortium is developing a fleet of promotional materials including the general PUP brochure (English, Spanish, Portuguese, Vietnamese, and Bahasa), the Interpretive Heritage Development Program (English and Spanish), and a new introductory *PowerPoint* presentation in English and Spanish. All brochures can be found at <http://pupconsortium.net/brochure-catalogue>.

With the recommendation of our advisor and graphic designer, Duane Fast, we streamlined our logo by removing extraneous elements, making it easier to identify and remember. We are still eliminating the old version from our materials.

Facilitator Certification

With the help of our most experienced facilitator, Pham Huong, we developed a formal set of criteria to become a certified facilitator. While no formal criteria exist for normal PUP facilitators, the concept of certified facilitator is much more demanding, offering a mechanism for consultant facilitators to ascend in prestige, privileges, and eventually compensation. As one of the criteria is having read the book by Kohl and McCool, no facilitator can achieve certification until 2016.

PUP Site Bridge Fund

Because we commit to working with sites even when the money lacks, we have created a fund concept to support our sites when money falls short and threatens a particular activity. This is a sort of crowd-funding approach where general members can choose to dedicate 50% of their membership fee to one site or another. Donations also welcomed. For more information on the Fund, see

<http://pupconsortium.net/wp-content/uploads/2014/10/PUP-Site-Development-Fund.pdf>.

Site Planning for Life



Managing Visitors for Heritage Destinations



Manual for Heritage

Site Planners and Managers

Developing a community's performance to manage a protected area in a DICE World (Dynamic, Impossible to Completely Understand, Complex, and Ever-changing) is a complex and highly interdisciplinary effort, involving many different fields such as education, grassroots development, natural resource management, organizational management, engineering, agriculture, spirituality, and many others. This requires a lot of experimentation under many different conditions, sharing experiences, organizing experiences into lessons learned, and returning those lessons learned to our teams of practitioners. No one perspective alone is enough to understand, no one person can work under many different conditions, no one person can take experiences from many others and synthesize them into training materials, case studies, and other materials for learning.

This is why the idea of LLCs has become increasingly popular. Organizations like the US Army, the US Department of Energy, US Coast Guard, and the wildlands firefighting community (www.wildfirelessons.net) have all established LLCs to speed up learning in complex situations. Since the PUP Consortium also promotes organizational management development in heritage areas with experiences in different cultures and parts of the world, it too needs a lessons learned center to organize and accelerate learning in our global community.

Three global centers based in Latin America, Europe, and Asia will channel information to the central Lessons Learned Center. Each Regional Learning Platform will be responsible for its area, developing materials in local languages, offering courses, and facilitating PUP development processes. They will be linked together through the central LLC and its virtual campus. The Latin American, the first, is based at CATIE, an institution already designed for remote and dispersed learning across the region. The second and third will be determined after the CATIE RLP is set up and establishes the base model.

The screenshot shows the homepage of the CATIE website. At the top right are links for "Español | English" and a search bar with a magnifying glass icon. Below that is a button labeled "¡Donate here!". On the left, the CATIE logo is displayed with the text "Solutions for environment and development / Soluciones para el ambiente y desarrollo". A navigation menu bar at the top includes links for Home, What is CATIE?, Education Programs, What do we work on?, Products and services, Where we work?, and Library Orton. The main content area features a large image of a white, two-story building with a red roof and arched windows, surrounded by flags and greenery. An orange callout box on the right side of the image contains the text: "CATIE is an international organization with a unique combination of science, graduate education and innovation for development". Below this image is a green banner with the text "We are hiring the next Director General". At the bottom, there are five blue boxes representing different programs: "High level consultancies" (with a gear icon), "Mesoamerican Agroenvironmental Programme (MAP)" (with a document icon), "Postgraduate programs" (with a graduation cap icon), "Events" (with a calendar icon), and "Contributing to change" (with a person icon).

Financial Position Ending 31 December 2014

Gross Revenues of PUP Consortium Projects[^] Collected by Members*

Project	Gross Revenues	Consortium Overhead	Donor
Phong Nha Ke Bang NP, Exploratory Trip, Vietnam	€7,577	€475	KfW-Germany
Valle de Oro NWR	\$15,830	\$1,245	US Fish & Wildlife
Total	\$25,895**	\$1,839	

[^]Consortium projects defined as those for which the Consortium collects overhead

*Does not include monies earned by non-Consortium partners

**Exchange rate for end of 2014, 0.862 euros/dollar

Assets Managed Directly through the PUP Consortium Paypal Account

Revenues		
Overhead	\$1,847	52%
Membership	\$1,700	48%
Core	\$1,000	
Technical Service	\$400	
Facilitator	\$300	
Total	\$3,547	
Expenses		
Website	\$1,215	73%
Publicity Materials	\$257	15%
Paypal Fees	\$196	12%
Total	\$1,668	
Difference	\$1,880	

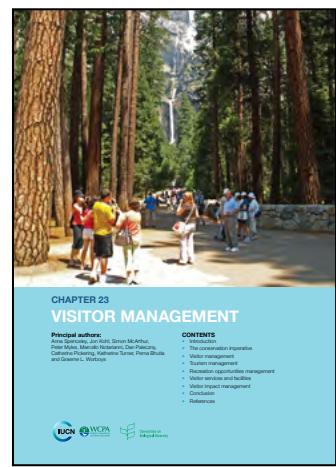
Cash Flow

	2013	2014
	\$0	\$1,881*

*Difference from above due to variable exchange rate with euros

Publications

Title	Author	Publisher/date	Online
“Achieving Self-Identity and Self-Worth” (community interpretation)	Jon Kohl	<i>Interpretation Journal</i> 19:1 (spring 2014), issue theme “Working with Communities”	http://tinyurl.com/self-identity
Holistic interpretive guide training enables the institution as well as the guide	Jon Kohl	<i>InterpNews</i> January–February 2015	n/a
Can we train tourism providers of different educational levels to offer interpretive programs?	Marisol Mayorga & Jon Kohl	<i>NAI Sourcebook</i> 2014 pp. 36–7	http://tinyurl.com/soucebook2014
What Is Really Real: A New Vision of Authenticity and Its Role in Interpretation and Alternative Tourism	Jon Kohl	<i>Legacy</i> , magazine of the National Association for Interpretation, Nov/Dec 2014	http://tinyurl.com/o58duhl
The International Interpretation Conference: Bringing the World’s Interpreters Together	Jon Kohl	<i>Journal of Community Archeology & Heritage</i>	Inaugural issue, April 2014
Alcanzar la propia identidad y la autoestima	Jon Kohl	<i>Boletín de Interpretación</i> 30 (Agosto de 2014)	http://tinyurl.com/q26rydb
Ayuda memoria: Elaboración de los productos y programas de uso público en los parques nacionales	Jon Kohl, Fernando Ramos & Spanish parks	Spanish Parks, Organismo Autónomo de Parques Nacionales	To come
Benefiting from Complexity Thinking (Chapter 10) in The Protected Area: Governance and Management Book	Stephen McCool, principal chapter author and editor	IUCN, 2015	Online in February/March as e-book
Tourism and Protected Areas: Integrating Community, Conservation and Visitor Experiences	Stephen McCool	Video of lecture on themes related to PUP. Uploaded October 2014. (50 min)	www.youtu.be/c8zObQiJJkk
Visitor Management (Chapter 23) in The Protected Area: Governance and Management Book	Jon Kohl, Principal chapter author	IUCN, 2015, section on visitor services and facilities	Online in February/March as e-book
Box 10.1: Changes in Assumptions about the character of social-ecological systems in Benefitting from Complexity	Jon Kohl, supporting chapter author	The Protected Area: Governance and Management Book IUCN, 2015	Online in February/March as e-book
The Future Has Other Plans: Journey from Conventional to Holistic Planning in Natural and Cultural Heritage Sites	Jonathan M. Kohl & Stephen F. McCool	Fulcrum Publishing, Applied Communication series, edited by Sam Ham	To be published in January 2016



Presentations

Presentation	Presenter	Event/place/date	Online
Can we train tourism providers of different educational levels to offer interpretive programs?	Jon Kohl & Marisol Mayorga	National Association for Interpretation national conference, Denver, USA November (60 min)	www.youtu.be/qYTSiilj48g
La Planificación de la Interpretación del Patrimonio en Contextos Comunitarios	Fernando Ramos	Feria de Turismo Cultural de México, San Miguel de Allende, Guanajuato, 23 October	
Guías usan la interpretación para conectar a los visitantes con la conservación del patrimonio	Jon Kohl	Servicio Nacional para Aprendizaje, Cartagena, national teleconference, December 4 (60 min + Q&A)	http://youtu.be/kK3zLjS00ZE
PUP - Uma metodología participativa para a construção de um Plano de Uso Público: O caso de Évora	Nuno Domingos, director of the Historic Center of Évora	Seminar on tourism management at World Heritage Sites at the University of Coimbra, 11 April	
Testimonial about interpretive framework in Evora, Portugal PUP	Nuno Domingos, director of the Historic Center	Video in English for PUP use (3:46 min)	www.youtube.com/watch?v=gAVJ_P54SCg
Testimonio sobre capacitación interpretativa en Parques Nacionales de Colombia	Clara Osorio, National Parks of Colombia	Video en español para promocionar nuestra capacitación en interpretación (1.5 min)	www.youtube.com/watch?v=A_tCd_497Bc



Classes and Workshops

Topic	Presenter	Location/Date	Online
Interpretive Planning	Jon Kohl & Fernando Ramos	One day workshop for the Asociación para la Interpretación de Patrimonio, community in Santiago de Compostela	
Interpretive planning	Jon Kohl & Fernando Ramos	Four-day workshop for National Parks of Spain, outside of Madrid	(Jon in Santiago de Compostela, 10 min) www.youtube.com/watch?v=zIWr0intuqE (Fernando in Santiago de Compostela, 11 min) www.youtube.com/watch?v=miowPfqfbUw (Fernando in Santiago 2, 10 min)
Introduction to interpretation	Jon Kohl	For environmental interpretation class at Universidad del Valle, Guatemala, with Erwin Herdocia	
Limits of Acceptable Change	Jon Kohl	For international protected areas course at CATIE, Turrialba, Costa Rica with Bernal Herrera	

As with any new organization, the first few years should be ones of experimentation and trying different models. This kind of innovation is fostered when an organization is not tied into a tightly designed and funded project that requires immovable objectives, indicators, and funding based on fulfillment of objectives. This is why organizations born with funding and formal funders typically have lower rates of success than organizations born without such funding and with the power to innovate, such as the Consortium.

Community Cultivation, Increasingly Important Concept

For nearly 15 years, PUP has focused on refining its modules or conversations that lead to version 1.0 of a public use plan. While these basic conversations which take 8–12 months to complete remain the heart of PUP, we are increasingly investing in the phases that come before and after the actual initial plan creation. We have researched significantly the premise that a community of actors has to achieve a certain level of readiness in terms of trust, conflict management, dialogue skills, alignment of vision and objectives about the planning process, and simply knowing each other before it can enter a multi-sectoral participatory planning process that has any hope of actually implementing its plan on an on-going basis. For this reason, PUP has been developing tools and approaches to working with communities prior to launching into a planning process. This consists of our Exploratory Trips and in 2015 work on using a conflict resolution process as a means of preparing a community to carry out strategic planning. In fact, to implement the resolutions that come from conflict mediation, a flexible and adaptive planning/implementing process must follow, making the three phases of community cultivation-planning-implementation an increasingly natural and organic fit. We will increase our capacity to achieve this by ensuring that we have a diverse membership with an expanded and integral vision of the development process.

Difficulty of Being Principled

To seek true development both individually and organizationally in order to protect heritage means avoiding many conservation and development projects commonly promoted today. So many projects violate the most basic principles of adult education, community development, participation, and power sharing. While few if any projects, even ours, can meet all the principles that we have laid before us as a road to a better world, it does result in rejecting more work offers than many of our contemporaries do. Our most recent example came at the end of 2014 when we conducted an Exploratory Trip at an archeological park in Colombia. While we could have secured a new project in our portfolio, our trip revealed that the likelihood of real development success was too low to take the chance. In 2012 we rejected an invitation by IUCN and Government of St. Lucia to work in its World Heritage site for similar reasons. Each rejection however strengthens us culturally and clarifies conditions in which real development can take root.



Diversifying PUP

Similar to the above, PUP will increasingly widen its net beyond its core competency in Public Use Planning. In 2014 it consolidated its heritage interpretation program and will continue to add components that will eventually allow it to apply its principles to all kinds of heritage planning and management. This will allow PUP to work with sites to improve performance under a wide variety of scenarios that do not necessarily imply work in just visitor management. For example, the same improvements in management agility and adaptability that have traditionally sought in public use, serves equally well to heritage sites that want to better prepare for climate change.

Holistic Planning and Integral Theory

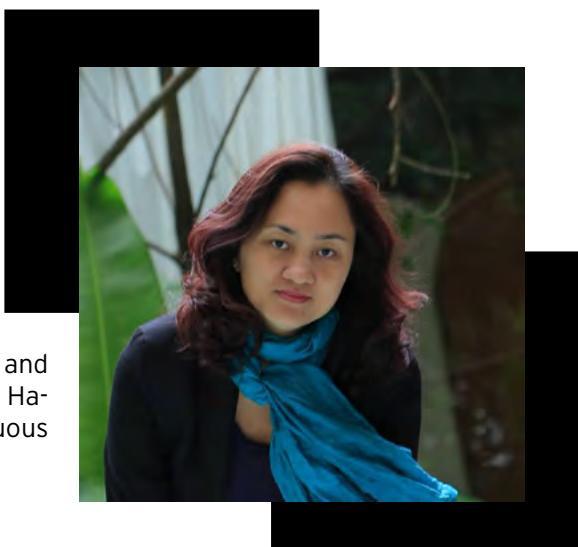
In 2014 Jon Kohl and Steve McCool submitted their book, *The Future Has Other Plans: Journey from Conventional to Holistic Planning in Natural and Cultural Heritage Sites* to Fulcrum Publishing for launch in January 2016. The book traces the decline of conventional planning (“Rational Comprehensive Planning”) and how the much more holistic notion of Holistic Planning will replace it. The theory behind HP, especially Integral Theory, underpins the PUP Process. Integral Theory gives a wider framework useful for visualizing all forms of development. PUP has explicitly used it so far in its Exploratory Trips as a lens for analyzing situation dynamics. The concept will be presented to the Consortium in 2015 by means of an upcoming White Paper that summarizes the book’s argument, prior to publication.

Involving More Members in Projects

So far Consortium membership and projects have emerged from founder Jon Kohl’s contacts network. Consequently there is a bias in our portfolio toward heritage interpretation and projects in which Kohl directly participates. While perhaps a necessary byproduct of the founder effect, the Consortium has before it the challenge of involving more members in projects. To do so requires active collaboration between members rather than just Kohl’s network.

Strategic Planning for a Young Organization

One might ask if we are an organization that specializes in planning, why don’t we have a strategic plan of our own? It is a valid question to which we would answer that a strategic plan is most apt for an organization that has a certain level of maturity and stability. For organizations that are just emerging, taking advantages of rising and new opportunities at every turn, that does not yet have a budget for money and time (especially considering the coordinator is a volunteer), and is still changing rapidly through experimentation and conversation to find a model that will eventually bring it to the next stage, we do not yet have the luxury of thinking beyond six months at a time. In fact research shows that the more a plan or project changes goals, the more likely it will fail. Having said that, we are developing a long-term vision with the Lessons Learned Center and Regional Learning Platforms. The how-we-get-there changes too quickly to warrant a strategic plan. The second reason is that an effective plan is the result of intense dialogues among community members and we have not yet found the resources to bring our members together to have that dialogue. As we consolidate, we will have more need to project resource allocations in the future. For now, our only overhead is our website and domain hosting. Otherwise, we remain adaptive.



Thanks to Pham Thanh Huong and her colleagues at the UNESCO Hanoi office, PUP has had a continuous presence in Vietnam since 2010.

Holistic Planning White Paper

Because Kohl and McCool's book on Holistic Planning does not go public until January 2016, the PUP Consortium and allies need a basic understanding of the principles of Holistic Planning described in the book. Thus in the first semester of 2015, Kohl and McCool will write a white paper in English and Spanish that introduces the idea and gives a glimpse into what the book will be about, so that PUP Consortium members can understand the basis of our work while we await the book's publication.

General Membership Category

The PUP Consortium currently has four membership categories: Advisor, Core, Technical Service Member, and PUP Facilitator. Now that we are finishing our initial launch of our website, we will be able to build a web-based general membership capability which will allow us to develop supporters of our cause to protect heritage through better management from around the world. For only \$30, year-long members can support specific sites as well as the general non-profit mission of the PUP Consortium. We hope to have an active membership which we encourage to participate in projects as volunteers and even as service providers (possibly changing membership categories). Check back at our website for PUPdates on membership.

Involve All Consortium Members in Live Conversations

To date, we have not succeeded in or most cases attempted live conversations of the different membership categories. Because of the importance of forming bonds between members, this year will make it a priority to hold phone conferences within all membership categories. Over time we will hold inter-category conferences and eventually use more sophisticated conferencing technologies.

Introductory PUP Course

Our first non-interpretation course will be our introductory PUP course. This approximately six-day course will introduce people to the theory and practice of Holistic Planning in the public use planning context. Certified PUP facilitators and other approved Consortium members will offer this course around the world.

Involvement of all Core and TSM Members in Projects

It is critical to include all core and TSM members in projects. This builds working relationships and enriches the Consortium's project portfolio. The degree of involvement of PUP Facilitators will depend in large measure on their initiative to find projects in their home countries.

Finish the PUP Book

As mentioned previously Kohl and McCool are publishing a book with Fulcrum Publishing which will lay out the theory behind the PUP Process. The book will be produced in 2015 and published in January 2016.

Develop the Regional Learning Platform at CATIE

The first leg of our global Lessons Learned Center will be put in place at CATIE in Costa Rica in representation of all Latin America. Once this leg is operational, it can be used as a model for the other legs to support the growth of the virtual, global LLC.