

# **Goal Communication at Ontario Heritage Sites**

**by**

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## **Authors' Declaration**

I hereby declare that I am the sole author of this thesis. This is a true copy of the thesis, including any required final versions, as accepted by my examiners.

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Irina Razinkova

## **Abstract**

Professional management literature suggests that goal setting is one of the most important steps in the organizational process as goals provide a clear understanding of the directions in which the organization is heading. In ensuring that each member of an organization is aware of its goals, the goal communication process is viewed as a central part of everyday management.

Goal communication between managers and interpreters at Ontario heritage sites is the focus of the present study. Three sites were investigated, and three different research methods were used to obtain the data: semi-structured interviews with managers and interpreters; analysis of documentation related to the operation of the sites; and participant observation.

The study's findings revealed that: 1) not all heritage sites have their goals documented; 2) the documentation of site goals does not necessarily guarantee that interpreters are aware of them; 3) goals of the sites are communicated to interpreters by only two means – orientation, and reading materials; and 4) more training is required for interpreters in order to implement their site's goals successfully and consistently.

A number of recommendations for heritage site management were developed, which include extending goal communication techniques to daily site interaction and to daily assignments given to interpreters, as well as exploring new goal communication channels and providing opportunities for continuous training of interpreters.

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# Table of Content

|   |             |
|---|-------------|
| <b>Abstract</b> .....                                 | <b>iii</b>  |
| <b>Acknowledgements</b> .....                         | <b>iv</b>   |
| <b>Table of Content</b> .....                         | <b>v</b>    |
| <b>List of Tables</b> .....                           | <b>vii</b>  |
| <b>List of Figures</b> .....                          | <b>viii</b> |
| <br>  |             |
| <b>1. Introduction</b> .....                          | <b>1</b>    |
| 1.1 Research question and objectives .....            | 2           |
| 1.2 Study areas .....                                 | 3           |
| 1.3 Definitions .....                                 | 4           |
| 1.4 Thesis structure .....                            | 5           |
| <b>2. Literature review</b> .....                     | <b>6</b>    |
| 2.1 Heritage .....                                    | 6           |
| 2.1.1 Heritage interpretation .....                   | 8           |
| 2.2 Management .....                                  | 12          |
| 2.2.1 Goal setting .....                              | 13          |
| 2.2.2 Communication strategy .....                    | 14          |
| 2.2.2.1 Training .....                                | 15          |
| 2.2.2.2 Feedback .....                                | 18          |
| 2.2.3 Evaluation .....                                | 19          |
| 2.2.3.1 Evaluation of interpreters' performance ..... | 21          |
| 2.3 Chapter summary .....                             | 23          |
| <b>3. Methodology</b> .....                           | <b>25</b>   |
| 3.1 The research study framework .....                | 25          |
| 3.2 Research design .....                             | 27          |
| 3.3 Data analysis .....                               | 29          |
| 3.3.1 Secondary data analysis .....                   | 30          |
| 3.3.2 Interviews .....                                | 31          |
| 3.3.3 Observations .....                              | 32          |
| 3.4 Chapter summary .....                             | 34          |
| <b>4. Findings</b> .....                              | <b>35</b>   |
| 4.1 Doon Heritage Crossroads .....                    | 35          |
| 4.1.1 Management structure .....                      | 39          |
| 4.1.2 Site documents .....                            | 41          |
| 4.1.2.1 Statement of Purpose .....                    | 43          |
| 4.1.3 Interviews at Doon Heritage Crossroads .....    | 44          |
| 4.1.4 Observations at Doon Heritage Crossroads .....  | 52          |
| 4.1.5 Summary .....                                   | 55          |
| 4.2 Westfield Heritage Village .....                  | 55          |
| 4.2.1 Management structure .....                      | 60          |
| 4.2.2 Site documents .....                            | 61          |
| 4.2.2.1 Vision statement and objectives .....         | 62          |

|           |   |            |
|-----------|---|------------|
| 4.2.3     | Interviews at Westfield Heritage Village.....   | 63         |
| 4.2.4     | Observations at Westfield Heritage Village.....                                       | 71         |
| 4.2.5     | Summary.....  | 73         |
| 4.3       | Dundurn Castle.....   | 74         |
| 4.3.1     | Management structure.....   | 77         |
| 4.3.2     | Site documents.....   | 78         |
| 4.3.3     | Interviews at Dundurn Castle.....   | 79         |
| 4.3.4     | Observations at Dundurn Castle.....   | 87         |
| 4.3.5     | Summary.....  | 89         |
| 4.4       | Chapter summary.....  | 89         |
| <b>5.</b> | <b>Discussion.....</b>  | <b>91</b>  |
| 5.1       | Determining the goals of heritage sites.....  | 91         |
| 5.2       | Determining the means of goal communication between managers and<br>interpreters..... | 93         |
| 5.3       | Evaluating the implementation of the goals by interpreters.....                       | 95         |
| 5.4       | Evaluating the effectiveness of goal communication.....                               | 99         |
| 5.5       | Developing recommendations for the most effective ways of goal<br>communication.....  | 105        |
| 5.6       | Limitations of the research.....  | 107        |
| <b>6.</b> | <b>Conclusion.....</b>  | <b>109</b> |
|           | <b>References.....</b>  | <b>110</b> |
|           | <b>Appendix A: sample of an email to the manager of a heritage site.....</b>          | <b>117</b> |
|           | <b>Appendix B: Interview questions (managers).....</b>                                | <b>119</b> |
|           | <b>Appendix C: Interview questions (interpreters).....</b>                            | <b>120</b> |
|           | <b>Appendix D: Checklist: Goal communication at a heritage site.....</b>              | <b>121</b> |
|           | <b>Appendix E: Checklist: Interpretation at a heritage site.....</b>                  | <b>122</b> |

## List of Tables

|   |     |
|---|-----|
| Table 1: Doon Heritage Crossroads – summary.....  | 37  |
| Table 2: Checklist: Communication at Doon Heritage Crossroads.....                          | 51  |
| Table 3: Westfield Heritage Village – summary.....  | 58  |
| Table 4: Checklist: Communication at Westfield Heritage Village.....                        | 70  |
| Table 5: Dundurn Castle – summary.....  | 75  |
| Table 6: Checklist: Communication at Dundurn Castle.....                                    | 86  |
| Table 7: Means of goal communication used by different heritage sites:<br>a comparison..... | 101 |

## List of Figures

|   |    |
|---|----|
| Figure 1: Performance evaluation process.....   | 20 |
| Figure 2: Map of Doon Heritage Crossroads.....  | 35 |
| Figure 3: Doon Heritage Crossroads: village street.....                                     | 38 |
| Figure 4: Doon Heritage Crossroads: an interpreter in the grocery store.....                | 38 |
| Figure 5: Management structure of Doon Heritage Crossroads.....                             | 40 |
| Figure 6: Map of Westfield Heritage Village.....  | 57 |
| Figure 7: Westfield Heritage Village: Entrance.....   | 59 |
| Figure 8: Westfield Heritage Village: interpreting the Seth Fothergill's<br>Print Shop..... | 59 |
| Figure 9: Management structure of Westfield Heritage Village.....                           | 60 |
| Figure 10: Dundurn Castle: Front view.....  | 76 |
| Figure 11: Dundurn Castle: neighboring buildings.....                                       | 76 |
| Figure 12: Management structure of Dundurn Castle.....                                      | 78 |



## **1. Introduction**

Plans for the future development of Canadian tourism have been emphasized in various Canadian Tourism Commission (CTC) documents (1999, 2004). The main goal of these plans has been to help Canada become an outstanding cultural destination for not only local but also for international tourism markets. Indeed, the best way to succeed in these endeavors is to ensure that staff at each cultural/heritage site understands the site's functions and successfully accomplishes its goals. This mandate is especially important today because of the intense competition for people's leisure time among different services in general and different tourist attractions in particular (Herbert, 1995).

This study is based on the assumption that no matter the type of organization – a private company, an NGO, or a government agency – it should have a clear understanding of the direction it pursues and should be able to measure the results of its endeavors. Indeed, both are achievable when an organization has a number of clear, measurable, and attainable goals outlined in a management plan or any other similar document (Alderson & Low, 1976; Rouillard, 1993). However, simply having goals is not enough; each manager and each employee of such an organization has to keep these goals in mind and has to be goal-oriented in order for this organization to succeed (Daft & Fitzgerald, 1992).

What are the goals of cultural/heritage sites? The Ontario Heritage Act (2006) describes the objectives of the Ontario Heritage Trust<sup>1</sup> (OHT). The last three of these objectives underscore the goals of heritage sites which I will be addressing in this study:

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<sup>1</sup> Ontario Heritage Trust is the province's heritage agency that is dedicated to preserving, protecting, and promoting of Ontario heritage.

- a) to advise and make recommendations to the Minister on any matter relating to the conservation, protection and preservation of the heritage of Ontario;
- b) to receive, acquire and hold property in trust for the people of Ontario;
- c) to support, encourage and facilitate the conservation, protection and preservation of the heritage of Ontario;
- d) to preserve, maintain, reconstruct, restore and manage property of historical, architectural, archaeological, recreational, aesthetic, natural and scenic interest;
- e) to conduct research, educational and communications programs necessary for heritage conservation, protection and preservation (Section 7).

It should be noted that the Ontario Heritage Trust owns and operates only a small fraction of heritage sites in Ontario. However, while the majority of the sites are operated by local governments and conservation authorities, in the absence of a clear policy we can assume that these sites operate under objectives that are similar to those of OHT.

This study seeks to investigate the degree to which interpreters at heritage sites are aware of these goals and how effectively these goals were communicated to them by their managers in order to contribute to the existing best practices in heritage site management.

### **1.1 Research question and objectives**

The study aims to answer the following question: how effectively do managers of Ontario heritage sites communicate the sites' goals to their interpreters? The purpose of this investigation is to develop recommendations for the most effective manager-

interpreter goal communication at Ontario heritage sites with the help of information gathered through site visits, document analysis and personal interactions.

To measure the effectiveness of goal communication, I look not only at how managers communicate the sites' goals, but also at how interpreters implement those goals in their everyday interaction with visitors. The following objectives guide the research:

1. to determine the goals of each heritage site;
2. to determine the means of communicating goals between managers and interpreters;
3. to evaluate the implementation of the goals by interpreters;
4. to evaluate the effectiveness of goal communication at heritage sites;
5. to develop recommendations for the most effective ways of goal communication between managers and interpreters.

## **1.2 Study areas**

Three heritage sites are studied in the present research: Doon Heritage Crossroads (Kitchener), Westfield Heritage Village (Rockton), and Dundurn Castle (Hamilton). The main reasons for choosing these particular sites were: 1) they are publicly owned,<sup>2</sup> so their managerial documents are readily available; 2) they offer comparable services and programming; and 3) they are located close to the University of Waterloo for the convenience of conducting the research. Descriptions of the sites and their management structures are provided in Chapter 4.

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<sup>2</sup> Doon Heritage Crossroads is owned by Region of Waterloo, Westfield Heritage Village is operated by Hamilton Conservation Authority, and Dundurn Castle is operated by The City of Hamilton.

### 1.3 Definitions

The following definitions were employed in this study:

**Heritage site** – “an individual building, complexes of buildings, landscapes or other places of historical interest or significance by reason of age or architectural design” (The cultural tourism handbook, 1993, p. 28).

**Manager** – an executive whose function is to plan, organize, and control, and to make decisions in order to achieve organizational objectives (Daft & Fitzgerald, 1992; Curtis, 1994).

**Interpreter** – an individual who interacts with participants to provide interest, to promote understanding, and to encourage a positive experience of a natural, historical, or cultural theme. The interpreter presents information by relating the subject to the participant’s frame of reference, through, for example, culture, ethnicity, or language (CTHRC, 2008).

**Goal** – a specific statement of what the organization (in this study – a heritage site) is planning to accomplish (Daft & Fitzgerald, 1992; Rouillard, 1993).

**Communications** – the process of conveying messages (facts, ideas, attitudes, opinions) from one person to another so that they are understood (Cuming, 1985).

**Effectiveness** – the degree to which the organization achieves a stated objective (Daft, & Fitzgerald, 1992).

**Evaluation** – “the judgment or assessment of achievement against some predetermined criteria, usually a set of standards or objectives” (Hockings, Stolton & Dudley, 2000, p. 3).

#### **1.4 Thesis structure**

The first chapter of this study briefly describes the research background, the research question and objectives, and introduces the definitions employed. The second chapter reviews academic and professional literature on heritage, management, and research methods that provide the framework for the study. The reviewed literature is summarized in checklists for research purposes. Chapter Three describes the methodology of the study; in particular, the steps undertaken in the research process, the methods of data collection, and the data analysis process. Chapter Four summarizes and describes the data obtained during the field research by means of interviews, observations, and secondary data collection. In addition, Chapter Four introduces and describes the three study sites: Doon Heritage Crossroads, Westfield Heritage Village, and Dundurn Castle. Chapter Five discusses the findings and presents the results to the investigation of the objectives and the answer to the research question. As the result of the research, Chapter 5 also provides recommendations to heritage site professionals about the most effective ways of goal communication between managers and interpreters. Finally, in chapter six the contribution of the study is discussed and future research opportunities are proposed.

## **2. Literature review**

The academic literature containing different aspects of heritage interpretation and management was reviewed and analyzed to provide the basis for this research. The literature review is divided into two main sections. The first section provides a general understanding of heritage, interpretation at heritage sites, as well as actual principles and techniques for practicing interpreters. The second section highlights the main principles of management in regard to communication and goal achievement.

### **2.1 Heritage**

Multiple academic sources about heritage cover a wide variety of themes. Preservation, authenticity, and interpretation are the most discussed topics (Alderson & Low, 1976; Barthel, 1996; Boyd, 2002; Chang, 1997; Hargrove, 1999; Kelleher, 2004; Lowenthal, n.d.; Wang, 1999; Young, 2006). An important subject of these discussions (Barthel, 1996; Jamieson, 2000), preservation is no longer seen as the process which attempts to stop cultural change. Rather, it is the practice of managing change and facing challenges brought by the combination of tourism and preservation. Among these challenges are: maintaining and conserving cultural heritage, achieving a better state of economic and social well-being, achieving sustainable tourism development, and providing tourists with a quality experience (Jamieson, 2000).

An increasing inability to discern between authentic and inauthentic heritage experiences is a major concern for heritage adherents as there is always a risk that the amount of reproduced heritage will devalue the notion of historic materials preservation and distort the public's understanding of history itself (Kelleher, 2004). There is a fine

line between what we call real heritage and reproduced heritage. For example, in the discussion of heritage villages, some of their buildings are real and historically belong to their current location; some buildings are brought from their original sites, raising questions about their integrity and authenticity; and some buildings are built to appear historic (Young, 2006). Apparently, while on a site, all three types of buildings look similar, and for a non-professional it would be difficult to distinguish between an original and a reproduction.

A very important place in academic literature is devoted to the questions of heritage interpretation and presentation (Alderson & Low, 1976; Anderson, 1982; Edwards, 1984; Herbert, 1995; Hewison, 1987; Howard, 2003; Hunt, 2004; Malcolm-Davies, 2004; Masberg & Silverman, 1996; Robertshaw, 1997; Roth, 1998; Tivers, 2002; Van West, 1989). Following tourist demand for more exciting and unique experiences, instead of regular museum exhibitions, a relatively new phenomenon of “living history” (when actors are used for history representation at heritage sites) emerged (Anderson, 1982; Hunt, 2004; Malcolm-Davies, 2004; Robertshaw, 1997; Roth, 1998; Tivers, 2002). The notion of “living history” generally includes history representation techniques such as first-person interpretation (when an actor plays a specific historical role and speaks “in character”), third-person interpretation, battle re-enactments, craft demonstrations, and games. Each of the mentioned history representation techniques can be seen in Ontario heritage sites. Unfortunately, first-person interpretation is difficult to find; instead, third-person interpretation with costumed guides is very common in Ontario (Doon Heritage Crossroads, Black Creek Pioneer Village, Land Pioneer Village, Dundurn Castle, and others). In spite of the obvious educational value of “living history” (Malcolm-Davies,

2004), some opponents think that people do not receive an actual critical discourse in history, but more drama and entertainment, from re-enactments (Hewison, 1987). Following this idea, Herbert (1995) does not believe that standards of heritage presentation might be developed because every site will have its own features and will encounter its own challenges in providing a relevant presentation. However, many believe it is possible at a heritage site to outline the main patterns for presentation that would contain educational value and authentic experience while performing in an exciting and interesting manner. I will talk more specifically about the principles and techniques for the successful heritage interpretation suggested by field professionals.

### **2.1.1 Heritage interpretation**

The subject of interpretation at historic sites is relatively new. Tilden's *Interpreting our heritage* (first edition: 1957), which is considered to be the first manuscript of this type, covers the basics of historic interpretation and begins the discussion about the philosophy and psychology of interpretation. Another classic book, *Interpretation of historic sites* (1976) by Alderson and Low, sets up the main principles of presenting the site, interpreting for different age groups, and selecting and training of interpreters. These books form the basis of this part of the literature review.

Most of the definitions of interpretation (Peart, 1978 cited in Marsh, 1986; Taylor 2006; Wagar, cited in Boulanger & Smith, 1973) emerged from Tilden's definition: "Interpretation is an educational activity which aims to reveal meanings and relationships through the use of original objects, by firsthand experience, and by illustrative media, rather than simply to communicate factual information" (1957, p.8). The purpose of



interpretation is to make people more aware of the places they visit, provide knowledge and, thus, understanding, and to stimulate interest which, according to Herbert (1989), “leads to greater enjoyment and perhaps responsibility” (p. 191). Good interpretation can raise the value of a site for visitors, and, in its turn, “greater value will lead to greater conviction of the need to preserve and protect” (Herbert, 1989, p.191). The following concept of interpretation was first presented in Tilden’s *Interpreting Our Heritage*: “Through interpretation, understanding; through understanding, appreciation; through appreciation, protection” (1957, p.38).

A great shift in the methods of interpretation at heritage sites has occurred in the last 50 years. Before this shift, wall panels, models, display items, writing materials, and audio-visual materials were the most common methods of interpretation. Personal interpretation was described as a new, rare but desirable approach (Edwards, 1984; Herbert, 1989; Tilden, 1957). Nowadays, more recent publications (Robertshaw, 1997; Roth, 1998; Tivers, 2002) discuss personal (or “living history”) interpretation as the main interpretation method while other methods are considered additional. This shift from impersonal to personal methods of interpretation and, even further, to visitor participation in interpretation is not surprising as psychological research has proved that “people retain about 10% of what they hear, 30% of what they read, 50% of what they see, and 90% of what they do” (Lewis, 1988, p. 27).

Authors (Alderson & Low, 1976; Boulanger & Smith, 1973; Marsh, 1986; Tabraham, 2006; Wagoner, 1989) agree that good interpretation is achieved only through good planning. To this end, the major decision for a site would be to determine its primary goal and secondary objectives that should be “entirely compatible to the primary

one” (Alderson & Low, 1976, p.11). The primary goal is necessary in order to determine the directions for reconstruction and interpretation of the site; and a set of secondary objectives “can increase substantially the conditions a site can make to the visitor’s understanding of our heritage” (Alderson & Low, 1976, p.18). The secondary objectives are usually the core historic facts that it is hoped the visitors will learn as a result of the visit. Both the primary goal and the secondary objectives have to be documented because, on the one hand, “the plan is a blue print for action” (Tabraham, 2006, p.60) and, on the other hand, in that case every committee chairman and every staff member will know what direction the site is taking and will coordinate their actions towards this direction (Alderson & Low, 1976). In addition, the majority of professional management literature believes that setting goals is the first step in any planning and organizational process. I will discuss in greater detail goals and goal setting in the Management part of the literature review.

It is not only important to communicate the right information to visitors; it is also important to communicate it properly so that the visitors understand what the site is about and the value it offers to the society. In this section, I have summarized from different sources the main principles that interpreters should use for better results of their interpretation.

1) The topic of the interpretation should be related to the day-to-day life of visitors (Boulanger & Smith, 1973) because “any interpretation that does not somehow relate what is being displayed or described to something within the personality or experience of the visitor will be sterile” (Tilden, 1957, p.11). The best way to do it is to develop analogies between different aspects of life in the past with those in the present.

For example, an interpreter can describe a life of an average farmer, inviting visitors to compare it with their lives: at what time a person had to wake up, what was the regular agenda for the day, how much money a person was able to earn and what he/she could have bought on that amount of money. Taylor (2006) suggests choosing themes based around customs such as eating, sleeping, working, and building a home because everyone can recognize and relate to them.

2) “Interpretation is a two-way communication process, just telling people facts may not enthuse and enrich their understanding” (Taylor, 2006); therefore, it is important to engage visitors in participation. Upper Canada Village, with its new program started last year, is an example of how visitors can be successfully involved in the interpretation. On some weekends regular visitors have an opportunity to become 19<sup>th</sup> century Village inhabitants: first, they dress up in period-specific clothes. Then within two days they participate in all kind of activities such as cooking, handiwork, and mill work. They are also engaged in old-fashioned singing and dancing. Finally, for a night they stay in an old-furnished 19th century residence. Thus, the program creates an effect of a time-machine and provides visitors with a better understanding of how it was like to live in the 19<sup>th</sup> century. According to Lewis (1988), an easy way to involve visitors in participation is to ask questions: What would you serve for guests? What would you wear? What would you be doing during long winter evenings, when there is no other source of light other than a candle?

3) An interpreter should be able to adjust his/her interpretation according to the age of visitors and the amount of interest the visitors show, which means that the interpreter has to listen carefully to the questions he/she is being asked.

4) Interpreters have to be as accurate as possible: they have to avoid using period-inappropriate objects such as watches, glasses with modern frames, earrings, and make-up (Lewis, 1988).

## **2.2 Management**

Management is most commonly defined as the attainment of organizational goals in an effective and efficient manner through main four processes: planning, organizing, leading, and controlling organizational resources (Bogardus, 2004; Daft & Fitzgerald, 1992). Planning includes selecting goals and ways for their attainment; during the organizational process, responsibilities for task accomplishment are assigned; leading uses personal resources to motivate employees; and, finally, the process of controlling is responsible for monitoring and making corrections (Daft & Fitzgerald, 1992; Dessler, 1995; Dixon, 2003).

Planning is considered the first and the most important function, because all the other processes are the results of planning. Therefore, effective planning is a key for an organization's overall performance (Daft & Fitzgerald, 1992). During planning, the goals of an organization and the necessary management actions for their implementation are chosen and documented. This document is usually called a management plan. The necessity for a management plan is difficult to overestimate; depending on an organization or a site, the management plan and the goals may be elaborated or may contain only a few points, but the plan has to exist to ensure the opportunity for growth (Tabraham, 2006). Goal setting is the first element of the planning process.

### **2.2.1 Goal setting**

Goal setting is an essential part of the planning process because goals provide an understanding of what an organization (or a heritage site) is intending to pursue in the future. Even though not all authors agree on the terms, for example Shoemaker (1984) uses the term “objective” instead of a “goal”, the definition and the idea remain the same: a goal is a specific statement of what the organization is planning to accomplish (Daft & Fitzgerald, 1992; Rouillard, 1993).

In addition to providing the main direction for development, goals carry out several other functions. First, they summarize, in short and clear statements, the work that should be done and point out the areas for development (Shoemaker, 1984). Second, a number of researchers in psychology as far back as in the 1980s proved that setting goals motivates individuals to perform better (Ivancevich, 1977; Konar, Meyer & Schacht, 1983; Locke, 1968; Locke, Shaw, Sarri & Latham, 1981; Mento, Cartledge & Locke, 1980). Finally, goals serve as standards of control in organizations as managers can compare the outcome with the original intention and improve performance where needed (Shoemaker, 1984).

The majority of authors writing about goal setting (Shoemaker, 1984; Rouillard, 1993; Sternbergh & Weitzer, 2001; Bogardus, 2004) agree on five essential characteristics of a successful goal: it has to be specific, measurable, attainable, output-oriented, and timed.

Specific: a goal has to include as much detail as possible.

Measurable: a goal has to identify “quantitative targets” (Sternbergh & Weitzer, 2001, p.23) for tracking progress and results.

Output-oriented: a goal has to acknowledge the particular requirements necessary to accomplish it.

Attainable: a goal has to be realistic about the timeframe and the available resources.

Timed: a goal has to have a specific deadline.

Other than setting the goals, management actions for their achievement have to be developed and described, and they have to acknowledge certain steps, a timeframe, and a number of supporting resources for completing each of the goals (Sternbergh & Weitzer, 2001).

Two main considerations for successful implementation of goals are: 1) the goal must be written (Alderson & Low, 1976; Rouillard, 1993), and 2) a person/organization has to be committed to the goal (Konar, Meyer & Schacht, 1983; Shoemaker, 1984).

### **2.2.2 Communication strategy**

Communication between managers and employees is a key element of the whole labor process. In fact, it is impossible to imagine a company or an organization without people communicating with one another on different levels and about different aspects of work.

Everyday communication with employees, training (formal and occasional), and feedback are the elements of a communication strategy in any organization. Bogardus (2004) defines communication strategy as a plan that describes different circumstances in which the organization will convey information to employees and identifies

communication methods to be used by different bodies of an organization. The other functions of communication strategy are:

- 1) providing shared understanding of goals;
- 2) providing understanding of individual contributions to the overall success; and
- 3) minimizing effects of misinformation (Cuming, 1985).

Cuming (1985) elaborates on the types of information that should be communicated to employees and especially emphasizes the importance of management plans and policy, goals and targets, day-to-day instructions, and the quantity and quality of production. There is also a separate topic about when the information should be dispersed, who should do it, and how to disperse it in the best way.

Authors identify three main methods of communication:

- 1) one-to-one meetings between supervisor and employee;
- 2) written materials such as personal/mass e-mails, circulars, bulletin board letters, newsletters, and employee newspapers; and
- 3) team/group meetings (Bogardus, 2004; Cuming, 1985; Gaynor, 2004).

It is also important to note that these methods would work best if they were used in conjunction with one another, rather than individually.

### **2.2.2.1 Training**

Training is defined by Armstrong (2006) in two ways. The first definition is more general: “the modification of behavior through experience.” The second definition is more specific: “bringing about of a significant improvement in performance as a result of instruction, practice and experience” (p. 506). Thus, the purpose of training is to give

employees sufficient instruction and guidance to enable them to perform their jobs effectively and to contribute to the achievement of corporate goals.

The objectives of training are:

- 1) to provide the necessary knowledge and skills;
- 2) to assist employees in becoming capable of assuming other responsibilities in an organization; and
- 3) to help employees adapt to changing circumstances facing organizations (Cuming, 1985; Grant & Smith, 1984).

A wide range of different methods and techniques of training are practiced today, and new ones are constantly being developed and evaluated. The most general methods include lectures, group discussions, case studies (the members are given a written summary of a business problem prior the discussion, and they jointly try to find the answer), role-playing exercises, projects (the analysis of practical problems), and business games (Armstrong, 2006; Daft & Fitzgerald, 1992; Dessler, 1995; Grant & Smith, 1984). Day-to-day coaching is considered as important as formal training (Bogardus, 2004) because it provides employees with an opportunity for improvement and managers with a means of control.

In the literature, interpreters are described in a variety of ways. They are even compared to marriage brokers as they bring “the visitor and the environment together in an atmosphere of mutual trust and pleasure” (Gourd, 1988, p.20). As well, no matter how often authors talk about the natural talent necessary for being an interpreter, most (Alderson & Low, 1976; Boulanger & Smith, 1973; Robertshaw, 2006; Tabraham, 2006) agree on the importance of appropriate training for the front-line staff. Moreover, “if such



training fails, bad 'living history' is certainly worse than poor static displays, graphic panels or computer programs" (Robertshaw, 2006, p.52).

Alderson and Low (1976) suggest the following elements of an interpreter training program:

- 1) Questions and references. Each trainee should be provided with a syllabus containing the basic information that is needed to interpret a site, a list of questions that visitors most frequently ask, and references to recommended reading.
- 2) Lectures and workshops. Lectures by experts in history, decorative arts, architecture, gardens, and related topics are helpful for all the interpreters no matter how long they work on a site.
- 3) Site tours. To teach the trainee how to apply the information he/she has learned, a site tour should be given that includes such important aspects as architecture, furnishings, gardens, and other physical features.
- 4) Demonstration tours. Trainees should join a regular visitor tour to see how a mature interpreter does his/her job (interprets the site, manages the group, and answers the questions). Alderson and Low (1976) believe that this is one of the most helpful procedures in training a new interpreter.

In addition to the initial training, Alderson and Low (1976) stress the importance of continuous training as it contributes to new understandings of the site and its history. Eventually, the more facts an interpreter knows, the more confident and flexible he/she will be while giving a tour or answering questions. Continuous training can be done in

many ways, including lectures and workshops, college courses, and visiting other heritage sites in the area.

#### **2.2.2.2 Feedback**

Another important element of communication strategy that is emphasized by a number of authors (Bogardus, 2004; Cuming, 1985; Gaynor, 2004) is feedback. The feedback is a two-way process: from employees to managers and from managers to employees. On one hand, the feedback from employees about instructions or plans makes managers sure that their directions have been understood. In addition, depending on the nature of this feedback, original ideas and concepts may need to be altered before finally being put into effect. On the other hand, to ensure an effective employee performance, managers have to be ready to instantly provide feedback to their staff for good work as well as for work that needs improvement. Bogardus (2004) argues that if employees receive regular feedback they are more likely to perform better.

With respect to the nature of feedback, it should be specific and based on facts rather than opinions, rumors, or judgments (Bogardus, 2004). How feedback is presented – especially negative feedback – is very important: it cannot become personal, even though it is often difficult to avoid personal connotation (Gaynor, 2004). Also, feedback should be presented in a respectful manner so that an employee does not feel attacked or embarrassed. After all, the whole idea of feedback is not to criticize but to help to do a better job.

Motivation, which can be considered a part of an organization's communication strategy, was discussed by a number of authors (Daft & Fitzgerald, 1992; Dixon, 2003;

Gaynor, 2004; Kleinbeck et al., 1990). Motivation plays an important role in how well the organization's goals are implemented; and in the research of management effectiveness the topic of motivation should not be overlooked. However, since the present study focuses solely on goal communication at heritage sites, motivation has not been discussed in the literature review, nor has the topic been included in the research objectives or in the interview questions.

### **2.2.3 Evaluation**

The concept of evaluation is closely related to the concept of feedback. Essentially, they both intend to achieve the same objective: to provide an unbiased opinion on the employee's work in order to improve it. A key difference, however, is that evaluation is a part of company's management as a whole; it is not simply one component of communication strategy.

The two main reasons for conducting performance evaluation (as identified by Bogardus, 2004; Dessler, 1995; and Euske, 1984) are:

- 1) It is a formal (and sometimes the only) opportunity for managers to provide feedback to their employees;
- 2) It is an opportunity to review the quality of the employees' performance and the progress they made, and to plan the correctional steps, if necessary.

Since the employee performance is supposed to be evaluated against some predetermined criteria, Bogardus (2004) talks about two different approaches to evaluation: one of them is traditional and based on the performance standards drawn from job description, the other one is relatively new and based on performance objectives

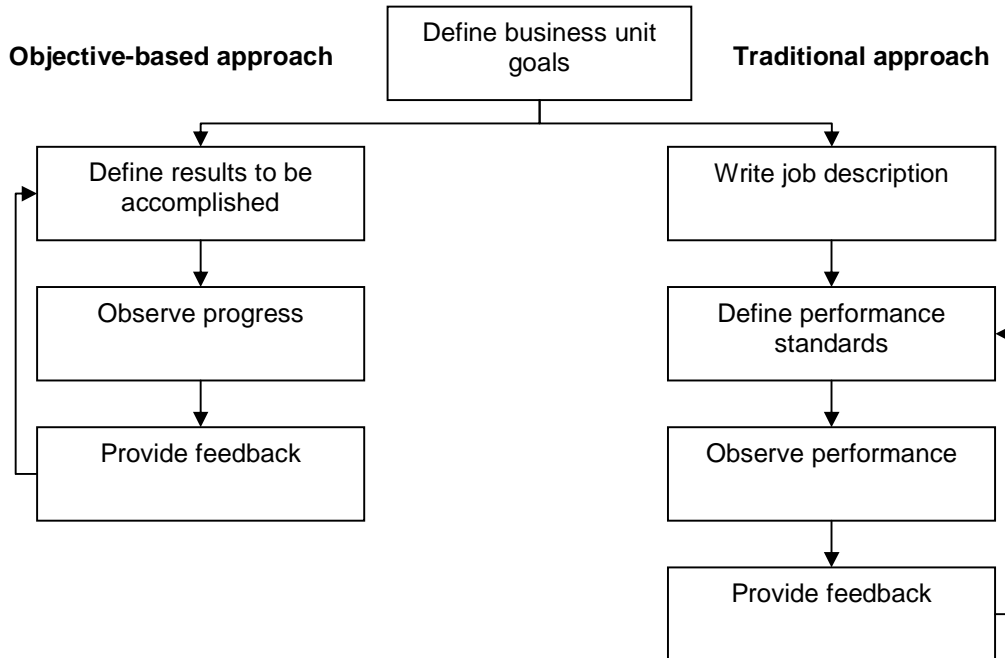
developed by both supervisors and their employees. Approaches are similar with regard to performance evaluation and are illustrated in Figure 1.

The chart illustrates very well the three processes usually undertaken during the performance evaluation. In addition, Bogardus (2004, p.196) offers three questions that can help managers to identify the effectiveness of evaluation in their companies:

- 1) Do employees know what they need to do?
- 2) Do employees have a way to measure success?
- 3) Do employees receive feedback on a regular and frequent basis?

As identified in the chart, it is important to note that the first step in the performance evaluation is to define the business goals.

Figure 1: Performance evaluation process (Bogardus, 2004, p.195)



It is also important that managers provide employees with instant feedback, both positive and negative (Bogardus, 2004; Dessler, 1995). If these performance

conversations happen on a daily basis, they become viewed as customary to employees and supervisors and are no longer seen as intimidating. In addition, “when employees receive regular positive feedback, they are more open to receiving negative feedback when it is necessary” (Bogardus, 2004, p.199).

### **2.2.3.1 Evaluation of interpreters’ performance**

The evaluation of interpreters’ performance is as important as the evaluation of employees in any other occupation and is usually done the same way. Marsh (1986) summarizes the reasons for the evaluation of interpretation as listed below.

- 1) “Evaluation forces an individual or agency to consider interpretation objectives more carefully” (p.12). Often, in the past, interpretation was assumed to be a public good, and objectives were not stated, or stated in such a general way that they provided little operational guidance.
- 2) To determine more precisely the educational and recreational impact of interpretation. This may include the quantity, type and quality of impact.
- 3) To assess the effectiveness of different interpretation methods and, as a result, to continue or discontinue using some of them.
- 4) Since most of the heritage sites are public funded, they have a responsibility to perform effectively.

According to Alderson and Low (1976), another reason – the encouragement of interpreters – can be added to this list. Evaluation is usually done through the observation of an interpreter’s performance. The manager or a person who conducts the training observes an interpreter “in action” and pays close attention to the quality of

interpretation; the interpreter's attitude and ability to handle groups; personal characteristics, such as voice, poise, appearance. After the observation, the manager provides an interpreter with suggestions on how to improve the performance (Alderson & Low, 1976).

Undoubtedly, the communication culture in each company or organization is unique; however, some universal patterns can lead to effective goal communication between managers and employees. Recommendations from professionals include the following:

- 1) Provide extensive job descriptions (Bogardus, 2004).
- 2) Create communication within the team (Blacklock & Jacks, 2007). One of the examples of such communication may be an exchange of performance feedback (Elliott, 2004).
- 3) Hold team meetings regularly (Cuming, 1985).
- 4) Seek input and guidance about the team's direction (Blacklock & Jacks, 2007).
- 5) Gather feedback after every innovation and use it for improvement (Elliott, 2004; Blacklock & Jacks, 2007). This recommendation is doubly rewarding: first, the necessary alterations may be undertaken in time; and second, it is important for future performance that employees see managers' sensitivity to the feedback.
- 6) Provide extensive feedback to employees to help them improve everyday performance, thus achieving the organization's goals.
- 7) Evaluation of interpreters' performance has to be held on a regular basis.

- 8) Involve employees in the planning process (Bogardus, 2004): it may bring “fresh” ideas and also encourages individual performance as the involvement gives a feeling of being an important part of the organization’s success.

### **2.3 Chapter summary**

The academic literature in the present research is not used to identify and fill in knowledge gaps. Rather, it builds a solid base for the comparison between theory and practice, between the recommendations of academics and professionals and the real actions undertaken daily at heritage sites. The data gathered through the field work will be compared to the recommendations pointed out by the literature, which has been summarized in two checklists for convenience.

The first section of this chapter is intended to provide an understanding of historical interpretation at heritage sites and the elements it includes. Since interpretation has great educational value and creates the meaning of a place, time, or activities, it has to be very genuine and thoughtfully executed. In addition, being an educational activity, interpretation has to be comprehensible, engaging, interactive, and age appropriate.

The second section of this chapter reviews the basics of the management process such as goal setting, training, feedback, and evaluation in order to outline the most necessary actions to be performed in any organization (including heritage sites) on a daily basis. Employee trainings, team meetings, active communication between team members and with the manager, as well as adequate and timely feedback are some of the necessary elements of the management process. When one or more of these elements is not

performed, one has a reason to question the effectiveness of an organization's goal implementation.



### **3. Methodology**

Three heritage sites were studied in the present research: Doon Heritage Crossroads (Kitchener), Westfield Heritage Village (Rockton), and Dundurn Castle (Hamilton). The chosen sites are similar in terms of the experience they offer to the public: all of them have costumed third person interpretation and similar programming. However, with unique organizational structures and management strategies, each site brings different perspectives to the study.

To evaluate the effectiveness of goal communication at Ontario heritage sites, a combination of investigative methods were used, including a discourse analysis of managerial documentation, on-site observations, and one-to-one, semi-structured interviews. For a fair comparison among the sites, each site was visited the same number of times, and the same number of respondents were interviewed for approximately the same duration, using the same interview questions. The description of the research study framework and methodological steps that were undertaken follows.

#### **3.1 The research study framework**

To answer the research question (How effectively do managers of Ontario heritage sites communicate the sites' goals to their interpreters?), a clear understanding of how to measure the effectiveness of communication is required. Built upon the definitions of communication and effectiveness applied in this study, effective communication would mean that, as a result of different communication methods used simultaneously by the management of a heritage site, interpreters know and implement the goals of their site consistently.

In the study, I introduced two checklists that are based on the academic and professional literature and that help me to summarize and analyze the research findings. The first checklist *Goal communication at a heritage site* (Appendix D) summarizes possible management actions that are necessary for the effective communication of goals from managers to interpreters. Even though each heritage site chosen for the present research has its unique management structure and policy, the more these actions are applied by the managers, the more effective overall manager-interpreter goal communication will be. The checklist helps to structure and summarize the interview data in order to obtain research objective #4 (to evaluate the effectiveness of goal communication at heritage sites).

The second checklist *Interpretation at a heritage site* (Appendix E) has an appearance similar to the Likert scaling (Research Methods Knowledge Base, 2006). However, it was created not to collect opinions on a certain topic but to summarize and visualize the overall impression that I have about each site after conducting the observational visits. The checklist was composed in accordance with the main principles of heritage interpretation gathered from professional literature; and observations were conducted by paying close attention to these principles. Being very illustrative, the checklist reflects the impression made by each site on the researcher and helps to evaluate the implementation of the site's goals by interpreters (objective #3).

In this checklist, the overall perception of the site is evaluated on the 5-point scale with 5 being excellent, 4 – good, 3 – average, 2 – poor, and 1 – bad. This scoring is personal, intuitive response to the experience that I had at each of the sites. The scoring is also based on other characteristics outlined in this checklist.

### **3.2 Research design**

The research was undertaken according to the following steps:

First, I contacted the manager of each heritage site by email, introducing myself and discussing the following points:

- 1) the purpose and nature of the study;
- 2) the benefits of the study for management of heritage sites; and
- 3) the assistance that I needed from each manager to conduct the study.

Appendix A provides the sample of the email.

Originally, three heritage villages were chosen for the research study: Doon Heritage Crossroads, Westfield Heritage Village, and Black Creek Pioneer Village. Managers of two of these three sites agreed to participate in the study, and the manager of the third site declined an invitation for personal reasons. As a result, I had to enroll one more site in the study. Since the season for heritage villages was almost over, the only heritage sites that stayed open were in-door sites such as museums. I chose Dundurn Castle as a third site for the following reasons:

- 1) the castle has costumed interpreters like two other sites;
- 2) it was open during the study period; and
- 3) it is located in the area of my research.

While having a lot in common with two other sites, the castle also introduced to the study a different dimension since it is a National Historic Site. That provided the opportunity to compare its management approach to the management approaches of regional sites.

The managers were asked to provide any available documentation related to the operation of the sites such as mission reports, management plans, annual reports, research studies conducted at the site, job descriptions, and employee handbooks.

Next, interviews with managers and interpreters of each heritage site were conducted as a second step in the research study. Managers were asked about goal communication strategies, interpreters' performance and its evaluation (Appendix B provides interview questions). Each interview took approximately 50-60 minutes, was digitally recorded, and then transcribed.

Similar interviews with three interpreters were conducted at each of the sites. The selection of participants was done in the following way:

- 1) during the site visits I selected three interpreters that I wished to interview;
- 2) I obtained permission from the manager to conduct interviews with the selected interpreters on the site; and
- 3) with the assistance of the manager I arranged the day and time for the interviews.

Three interviews per day were conducted at each of the sites; they usually took place during the operating hours when there were no visitors, and each lasted approximately 30 minutes. The interview questions for interpreters (Appendix C) were similar to those for managers (Appendix B) in order to obtain different points of view on the same issues. The interviews were digitally recorded and, then, transcribed.

To ensure anonymity, the recorded information and transcripts are stored in a secure location. Citations from the interviews are used in the discussion section without naming the person who provided them. For purposes of anonymity, instead of

participants' names, I use the combinations of letters and numbers (e.g., 2\_T, 1\_B, 2\_A1) when quoting.

Finally, as one of the components of the research study, on-site observations were conducted from October 21<sup>st</sup>, 2007 to February 5<sup>th</sup>, 2008; each site was visited three times. In order to compare interpreters' performance in different situations, two observations were conducted on regular days and one observation was done during a special event: Christmas celebration.

Because each site differs in size and in number of activities, the amount of time dedicated to each on-site visit varied from two to three hours. To ensure that each site was given equal attention, I had to visit every open building on a site, listen to every interpreter, and participate in every activity that was offered at the time of the visit. During these observational visits, I took pictures and made descriptive notes for later analysis.

Site visits were conducted for two reasons. First, to make myself familiar with the site: its layout, number and type of buildings and artifacts, interpretation practices, and overall atmosphere. Second, they helped me to better understand how interpreters implement their everyday job (assuming that it should lead to the implementation of the site's goals) and whether certain goals of the site have actually been carried out.

### **3.3 Data analysis**

According to Creswell (2003), the data analysis involves “preparing the data for analysis, conducting different analyses, moving deeper and deeper into understanding the

data, representing the data, and making an interpretation of the larger meaning of the data” (p. 190).

Three main bodies of data were collected during the field research period: managerial documents from the sites, interviews with managers and interpreters, and on-site observations. This section describes the procedures that were undertaken to organize, analyze, and interpret the obtained data.

### **3.3.1 Secondary data analysis**

During the first part of the research, secondary data such as management plans, annual reports, staff manuals, newsletters, and other relevant documents were examined to identify the goals of each heritage site. The analysis was done to achieve objective #1 (to determine the goals of each heritage site). This step was complicated by the fact that not every site had documented goals. Moreover, each heritage site uses its own terminology in documents; therefore, in the absence of goal statements, objectives, operating principles or vision were considered for the research.

Confusion between explicit (documented) and implicit (mentioned by managers but not documented) goals also complicated the research. Although the identification of implicit goals is not a part of this investigation, they nevertheless will be mentioned in the following section since implicit goals often explain certain management actions and add extra information to the analysis of management-interpreter communication as a whole.

The ethnographic approach, as described by Coffey & Atkinson (2004) and Silverman (2006), was used as the most appropriate way to analyze the sites’ documents, treating them as “social facts” as oppose to “firm evidence of what they report” (Coffey

& Atkinson, 2004, p.58). According to this approach, the researcher is constantly questioning them, e.g., for what purpose the texts are written, what is recorded, what is omitted, and what is taken for granted? (Hammersley & Atkinson, 1983). These questions helped to look deeper into the content of the documents, understand what information is present and what is missing, and determine the goals of the sites or their equivalents.

### **3.3.2 Interviews**

Semi-structured interviews with managers and interpreters were conducted to achieve objective #2 (to determine the means of communicating goals between managers and interpreters), objective #3 (to evaluate the implementation of the goals by interpreters), and objective #4 (to evaluate the effectiveness of goal communication at heritage sites).

Transcripts of interviews were analyzed to uncover the themes related to the effective communication of goals from managers to interpreters, paying close attention to positive and negative aspects of the way goals are set and delivered, training conducted, and feedback provided.

Interviews were analyzed in accordance to qualitative research strategies: initial coding and then focused coding (Charmaz, 2006; Creswell, 2003) were used to summarize responses and identify the main themes. As a first step (initial coding), I conducted a line-by-line analysis of the transcripts by highlighting key words and phrases and assigning them two- or three-word codes. For each interview with a manager, I made separate lists of codes. Codes from interviews with interpreters were combined in one list

for each site and organized by questions. The next step was focused coding – combining similar codes under one, more conceptual category, which allowed me to come up with five main themes that reflect my objectives and a number of secondary themes. The five main themes are:

- 1) Communication on the site;
- 2) Goal communication;
- 3) Goal implementation;
- 4) Performance evaluation; and
- 5) Daily routine.

The question about the daily routine at the site (What do you usually do when there are no visitors in the village?/ What do your interpreters usually do when there are no visitors in the village?) was asked to gain insight into the interpreter’s job beyond the interpretation and to see how daily assignments might be adjusted to provide interpreters with more information about the goals of the site. In Chapter 4, these themes are described in detail and illustrated with quotes from the interviews.

### **3.3.3 Observations**

Three observational visits were conducted at each of the locations to make me familiar with the sites: their lay-out, types of houses/rooms, costuming, types of characters presenting history as well as the type of communication between interpreters and visitors. For example, I paid attention to the way the visitors are greeted and to the amount and the content of information being provided by interpreters. Ultimately, the



observations were conducted to achieve objective #3 (to evaluate the implementation of the goals by interpreters).

Observations in the form of field notes were recorded during and immediately after each visit (Emerson, Fretz & Shaw, 1995). Pictures taken on the site helped me with the recollection and description of places and people.

During the analysis, the observation notes were treated the same way as interviews: they were printed; differences and similarities among the data as well as the information that supports or disproves interview findings were highlighted and coded, then codes were put together into larger themes (Emerson, Fretz & Shaw, 1995; Silverman, 2006).

Observations are always subjective because they are the result of a researcher's perception; they are also limited by the time and location. Therefore, to avoid drawing false conclusions based solely on the data obtained through observations, in my notes, I was simply describing (without judging) what I saw and heard. However, observations supported or contradicted by the data from the interviews or documents provide an opportunity for a constructive discussion in Chapter Five.

In Chapter Four, the results of observations are organized in checklists (Appendix E) that are complemented by commentaries. The checklists and commentaries were completed after visiting each site three times. While I tried to be as unbiased as possible, there is a chance that my opinion may differ from those of other visitors.

### **3.4 Chapter summary**

The research study was conducted at three Ontario heritage sites: Doon Heritage Crossroads (Kitchener), Westfield Heritage Village (Rockton), and Dundurn Castle (Hamilton). Three methods of inquiry were used to facilitate the research: secondary data collection, semi-structured interviews with managers and interpreters, and on-site observations.

Management documents such as management plans, annual reports, staff manuals, and newsletters were collected. One interview with a manager and three interviews with interpreters were conducted at each of the sites. Finally, three observational visits per site were carried out. All the gathered data is summarized and described in Chapter 4. Then, Chapter 5 performs the analysis of this data based on the five research objectives.

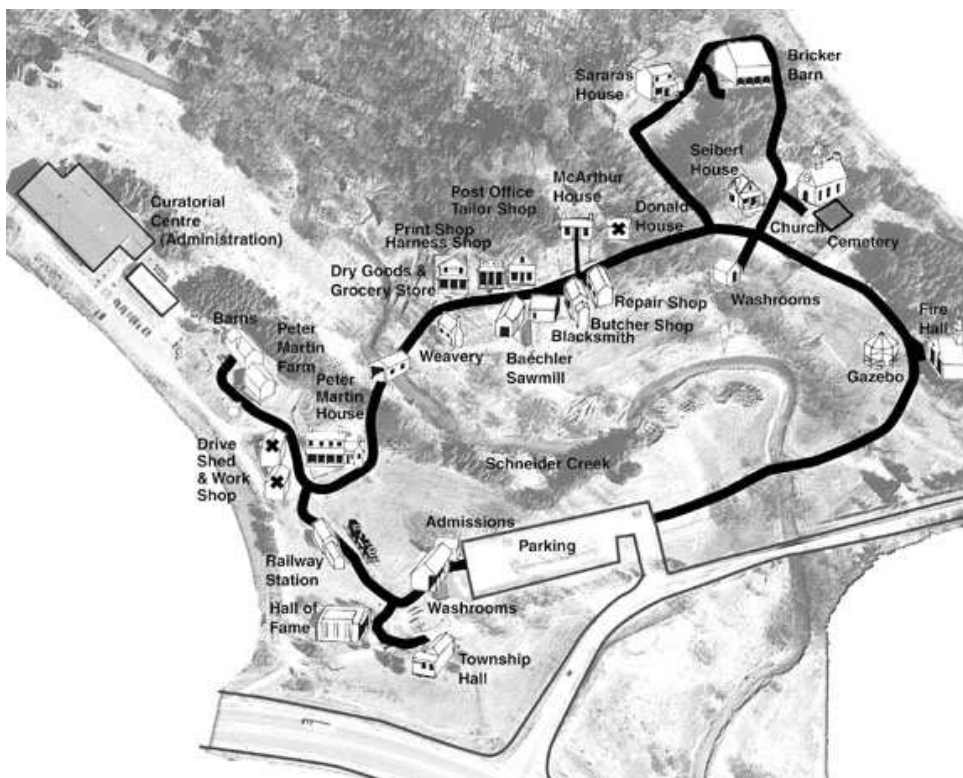
## 4. Findings

This chapter describes all three study areas and summarizes the findings gathered there by the means of semi-structured interviews, on-site observations, and secondary data collection. The information is organized in three main sections by location.

### 4.1 Doon Heritage Crossroads

Doon Heritage Crossroads (Doon) is a recreated, living-history museum that represents a typical rural Waterloo County village in 1914. The site is promoted as an educational place for families, and the majority of activities are designed for both adults

Figure 2: Map of Doon Heritage Crossroads



(source: <http://www.region.waterloo.on.ca/>)

and children. Except the period from January to May when the village is closed to public visits (even though some workshops are still offered), Doon is open five to seven days a week depending on the season. The main characteristics of the site are summarized in Table 1; however, the type of interpretation and programming will be described in more detail.

Doon uses only costumed third-person interpretation, which is reflected in how the interpreters construct their speech. Similar to museum guides, they use descriptive, explanatory sentences that frequently start with “If it were in 1914...” or “He/she/they would have been...” However, the main difference between recreated village interpreters and museum guides is that interpreters actually do what they are talking about or showing to visitors: they cook, wash the dishes, or make cabinets, using old recipes and tools.

In terms of programming, Doon focuses mainly on general public and school educational programs. In general public programs, visitors of different ages come anytime during operating hours, walk around the village, and talk to interpreters. School programs are more organized; for each educational program (depending on the grade and the type of unit), Doon has an educational manual that states the goals of the particular unit in the school curriculum and describes the activities involved in the program. For example, in the grade two curricula, there is a unit about traditions. Instead of teaching this lesson in class, schools bring their children to the Village, and interpreters teach the unit interactively. Thus, every school program is tied to the curriculum.

Table 1: Doon Heritage Crossroads - summary

|                                     |  |
|-------------------------------------|--|
| <b>Name of the site</b>             | <b>Doon Heritage Crossroads</b>  |
| <b>Type of the site</b>             | Living history museum  |
| <b>Location</b>                     | Kitchener, Ontario   |
| <b>Owner</b>                        | Region of Waterloo   |
| <b>Operating budget</b>             | \$1,789,960  |
| <b>Number of visitors</b>           | 38,264 visitors in 2007  |
| <b>Period of history</b>            | 1914 (or in general early 20 <sup>th</sup> century)  |
| <b>Number and type of buildings</b> | <p>18 buildings + locomotive</p> <p>Type of buildings: regular houses, township hall, railway station, fire hall, church, barn, grocery store, blacksmith shop, post office/tailor shop, print shop, repair shop, butcher shop, harness shop, sawmill, weavery</p> <p>Additional buildings and constructions: Hall of fame, Curatorial centre (administration), gift shop/admissions office, covered bridge, gazebo</p>  |
| <b>Interpreters</b>                 | <p>Seasonal employment.<br/>Mostly students as interpreters.<br/>About 25 paid interpreters in summer and about 10 in winter.<br/>Over 1000 volunteers engaged in different jobs, and about 150 of them volunteer as interpreters during special events</p>  |
| <b>Type of interpretation</b>       | Costumed third-person interpretation   |
| <b>Programs</b>                     | <p>School and public programs are offered regularly.</p> <p>Special programs and events vary and may include:</p> <ul style="list-style-type: none"> <li>- Crafts: Evergreen Wreaths (making wreaths to take home), Apple Harvest Day (making apple butter, cider and schnitzel)</li> <li>- Christmas events: Country Christmas, Starry Night, Doon by Lantern Light Tours</li> </ul> <p>Additional services:</p> <ul style="list-style-type: none"> <li>- Workshops (e.g., seed saving workshop, genealogy workshop, crewel embroidery workshop, bread making 101)</li> <li>- Festivals (e.g., Children’s Groundwater Festival, Family Water Festival)</li> <li>- Kitchener-Waterloo-Cambridge Post Card Club meetings</li> </ul> |

Figure 3: Doon Heritage Crossroads: village street



Figure 4: Doon Heritage Crossroads: an interpreter in the grocery store



(source: Photos taken by the researcher)



Special events are hosted several times a year: usually one per season and on major holidays such as Christmas, Halloween, Easter, and Canada Day. During Christmas events, for example, the public has the option of riding a horse-drawn wagon, tasting apple cider and other treats, listening to Christmas carols in Freeport Church, or taking a lantern-lit walking tour of the village.

In addition to these special events, Doon regularly hosts craft activities (e.g., Evergreen wreaths, Gifts in a Jar), hands-on workshops (e.g., Pruning Trees and Shrubs Workshop, Christmas Breads, Growing and Using Herbs), festivals (e.g., Children's Groundwater Festival, Family Water Festival), and Kitchener-Waterloo-Cambridge Post Card Club meetings.

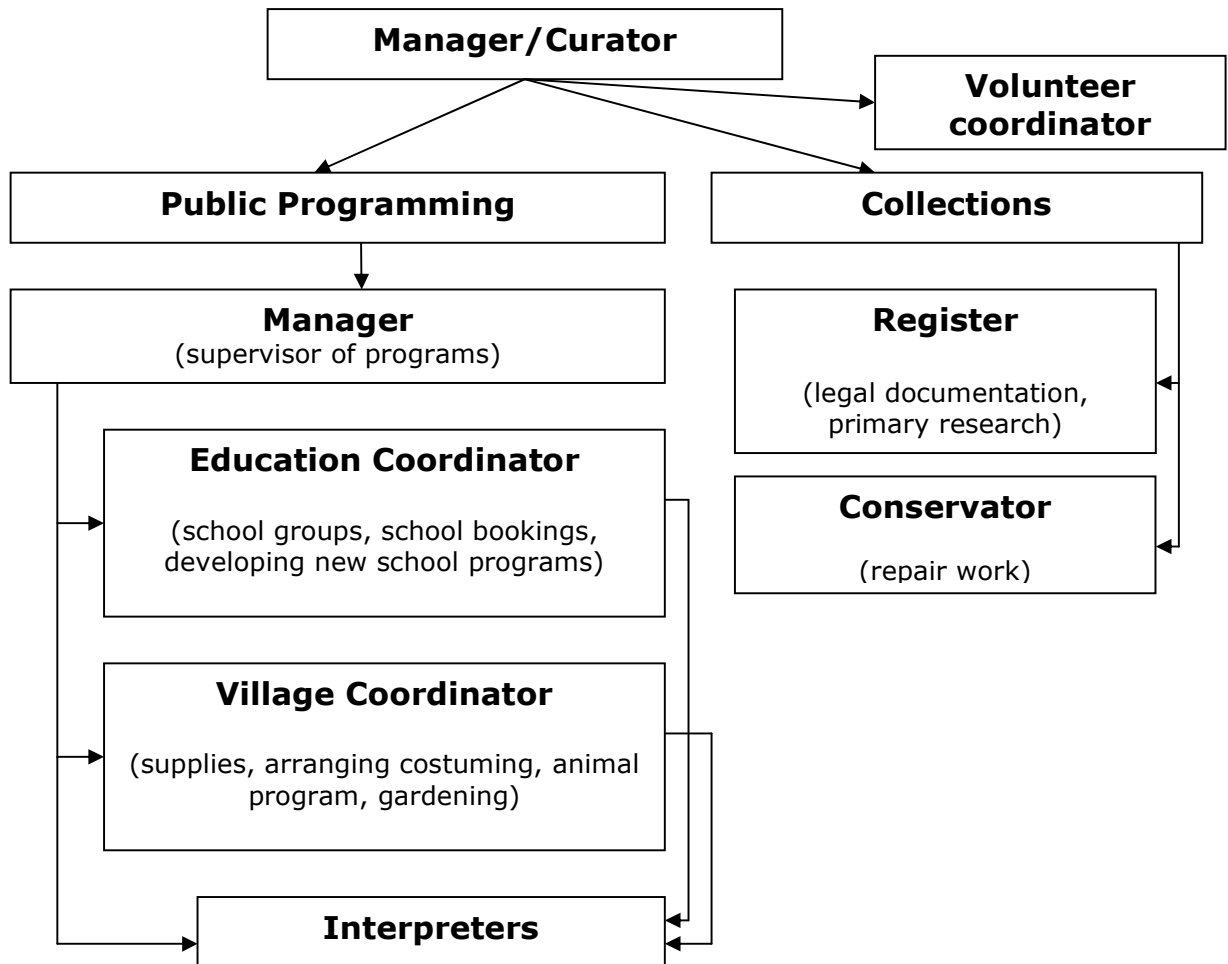
#### **4.1.1 Management structure**

The Doon website mentions two main missions of the village: 1) interpretation of a re-created village and two farms, and 2) collection and preservation of artifacts. These two major directions are reflected in the management structure of Doon, which has two main departments: Public Programming and Collections (Figure 5).

Under Public Programming there is a manager who is responsible for all programming on the site, and Education and Village Coordinators report to him. The Education Coordinator develops and implements school programs: he arranges for school groups to come to the village, develops new programs, and trains interpreters to implement the programs. The Village Coordinator oversees the day-to-day operation of the village: e.g., buys supplies, arranges costuming, and manages the animal and

gardening programs. Either one or both of the coordinators lead the daily morning 10-minute meetings with interpreters, explaining tasks for the day, and evening debriefings.

Figure 5: Management structure of Doon Heritage Crossroads



Interpreters hold seasonal positions and are mostly university students who work during their summer breaks and co-op terms; however, four contract positions are filled by non-students based on eight month of full-time employment: 1) blacksmith, who is also in charge of other trades; 2) domestic interpreter; 3) gardener; 4) farm and agriculture worker.



The Collections Department and Volunteer Coordinator position are separate branches of Doon's management structure. The Village has approximately 1000 volunteers who help with collections, construction, gardening, costume maintenance, and interpretation during special events.

#### **4.1.2 Site documents**

Documents obtained at Doon Heritage Crossroads include Statement of Purpose, Annual Report, Seasonal Staff Manual, Educational Manual, and an issue of a newsletter.

Statement of Purpose, a document published online on the Region of Waterloo website, applies to all public museums and other heritage assets owned by the Region<sup>3</sup>, including Doon Heritage Crossroads. The document presents the general goal statement for the regional museums and its implementation as well as a specific purpose of the Doon Heritage Crossroads.

The Annual Report is dated April 2007 and addressed to the Planning, Housing and Community Services Department of the Region of Waterloo. The report summarizes the operations of Doon Heritage Crossroads in 2006 and highlights initiatives planned for 2007. In particular, the report provides information about the attendance, public and educational programs, capital investments, volunteer contributions, and curatorial achievements in 2006 as well as initiatives for building a civic park, introducing a new full-day school program, and changing existing public programs in 2007.

Based on the report, the main areas of development at Doon Heritage Crossroads are:

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<sup>3</sup> Doon Heritage Crossroads, McDougall Cottage, Joseph Schneider Haus Museum and Gallery, Waterloo Regional Curatorial Centre, and West Montrose Covered Bridge

- 1) attraction of visitors (attendance decreased from 42, 428 in 2004 to 37,449 in 2006; therefore, the new full-day school program and additional activities to public programs were developed);
- 2) artifact collection (the staff started writing a Collecting Development Plan, outlining how the museum should improve its artifact collection); and
- 3) facilities maintenance and construction (building maintenance and site development projects are planned every year).

Seasonal Staff Manual is a practical handout given to the interpreters on their first day of work. The manual covers a wide variety of technical information: schedules, safety tips, building cleaning and closing procedures, costume and artifact handling information. There is information about who to contact if an interpreter encounters a specific problem and the list provides seven names to choose from.

Educational Manual is a large brochure also given to new interpreters that describes school educational programs (e.g., a Child's Life: 1914, Our Pioneer Heritage, Early Settlement in Upper Canada, Amazing Machines). The manual provides very detailed information for each house and each program of how to host school groups: what to show, to say, and what games to play.

A newsletter – Events and Exhibits – issued by the Department of Planning, Housing and Community Services every four month contains cultural news, historical information, and announcements of upcoming exhibits and events at the Region of Waterloo museums. The newsletter is distributed among employees and visitors.

#### **4.1.2.1 Statement of Purpose**

According to the Region of Waterloo official website, the Mission Statement of Doon Heritage Crossroads is currently under development; however, the Statement of Purpose<sup>4</sup> (last revision: June 2002) that applies to all heritage museums of the Region has some information regarding the site's goals. According to the Statement, the goal of Doon Heritage Crossroads and of other heritage museums of the Region is to provide "...heritage programs and services responsive to the interests of the residents of the Region of Waterloo." It is stated that the goal can be achieved "by the effective use of our human and financial resources to collect, preserve, study and interpret the heritage of the Region." Further, implementation of the goal is seen through the following actions: 1) collection, preservation, research, and interpretation of artifacts and buildings; 2) maintaining and operation of heritage facilities; 3) cooperation with other heritage sites and organizations within the Region of Waterloo; and 4) advising the general public about the preservation of culture and heritage.

The purpose of Doon Heritage Crossroads as a part of the heritage community of the Region is "to maintain a living history museum and maintain other appropriate facilities to convey the history and the culture of the Region of Waterloo in an interesting, exciting and accurate manner by collecting, preserving, researching, and interpreting appropriate objects, specimens and buildings." The Statement of Purpose also documents how the aforementioned will be achieved:

The site will attempt to create an accurate historical environment in which the variety and range of human life and activity within such a community can be presented to the public.

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<sup>4</sup> Source:

<http://www.region.waterloo.on.ca/web/region.nsf/0/23cd10b5f420d7a685256bf40061f71f?OpenDocument>

Saying that, the museum takes a responsibility to provide “living history programming; resource areas for use by the staff and general public; adequate storage facilities for artifact and archival collections; educational and visitor orientation facilities; ancillary public facilities such as picnic facilities, food and retail sales facilities; ancillary staff facilities, such as offices, workrooms, etc.; and a representative landscape historic environment.”

To simplify, I have organized the above into seven separate goals of Doon Heritage Crossroads:

- 1) To collect artifacts, archival materials, specimens, and buildings.
- 2) To preserve artifacts, archival materials, specimens, and buildings.
- 3) To research artifacts, archival materials, specimens, and buildings.
- 4) To interpret artifacts, archival materials, specimens, and buildings.
- 5) To maintain the buildings and other appropriate facilities in the village.
- 6) To advise the general public about the preservation of culture and heritage.
- 7) To present the history of the region in an interesting and accurate manner.

#### **4.1.3 Interviews at Doon Heritage Crossroads**

The analysis of the interview data revealed five common themes: 1) Communication on the site; 2) Goal communication; 3) Goal implementation; 4) Performance evaluation; and 5) Daily routine.

### Communication on the site

Daily meetings are the main means of manager-interpreter communication at Doon Heritage Crossroads. The meetings happen every day in the morning and in the evening and take approximately 10 minutes. Morning meetings “are very factual kind of meetings: who’s coming today, what school group, what school program will be taught, who’s getting lunch at what time” (D\_M). The jobs for the day are also assigned at this point. The interviewees support one another saying that they really appreciate having these meetings because they receive information about what to expect during a day:

I like the way that we do morning and evening meetings: it gives them [managers] a chance to tell us what’s going on during a day. It’s not like we show up and don’t know what to expect (2\_A2).

In other words, meetings with the managers contribute to the feeling of confidence among the interpreters and consequently help to overcome apprehensions on a given day. The second reason why the meetings are appreciated is because of the guidance that interpreters receive:

It’s pretty important because otherwise the job probably won’t be done if they don’t tell us every day what to do (2\_B).

Evening meetings are organized similarly. All interpreters pointed out that in the evening they have an opportunity of two-way communication with the managers:

At the end of the day – same thing: we go over what happened that day, and we have a chance to give comments or suggestions or any notes (2\_A1).

In addition, during the day managers “...come in the village every once in a while” (2\_A2) and that is the reason why interpreters feel that “there is always someone available for us to talk to, they are always physically here” (2\_A1).

A newsletter can be considered as an alternative means of communication at the site. Even though it is mostly oriented toward the external public, “every employee gets a copy and we [management] hope they read it (D\_M).”

### Goal communication

With regard to goal communication at Doon Heritage Crossroads, it is mostly done through orientation training. The orientation is a week-long event happening at the beginning of each season. All kinds of information are being presented to new interpreters:

This orientation involves everything from how to use fire extinguishers and safety issues to how to greet the public as well as what some of the upcoming projects are (D\_M).

Both interpreters and the manager named the orientation training as the main source of information regarding the goals of the site:

[The manager] goes over the goals, what’s happening with the museum, goals for not just what we want to show to the public, but long-term goals for the museum (2\_A1).

At the beginning of the season we give them a pretty good, but general overview of our mission (D\_M).

However, the main purpose of the training is to provide interpreters with enough factual information necessary for everyday work on the site and, therefore, the goals of the institution may not receive adequate attention:

We probably don’t focus on it [goals] very much because the reality is there is so much that we need to train people in a week that there are frankly some more important issues that they need to understand for the day-to-day operations (D\_M).

During the training, interpreters are provided with reading materials that include Seasonal Staff Manual, Educational Manual, and manuals for each building:

It's a lot of reading right of the bat. But through four months we've got most of it done (2\_B).

The large amount of information during the training, in addition to readings about the houses, artifacts, and educational programs can become so excessive that by the end of the week interpreters may have forgotten everything they were told at the beginning of the week "because they are overwhelmed with the details of the new job (D\_M)." This, according to the manager, is the main reason why interpreters may not remember the goals of the site and, consequently, this is why the manager does not consider goal communication on the site to be very effective. The interpreters somewhat corroborate this position by saying that:

I vaguely remember them [goals] and I was probably told about them but I don't really know [...] In that respect they probably didn't drill them into our heads (2\_A2).

However, all interpreters believe that overall communication at the site is effective because "we know what our day-to-day job is and what we try to achieve" (2\_A2). The main reason for it is a well organized and specific management structure where "certain people do certain things" (2\_A1):

The system that we have now when there is always someone to report to works very well (2\_A1).

The interpreters pointed out the alternative ways of learning about the goals of the village. One of these ways has been through a review of their job descriptions:

...when I was interviewed for this job we had a job description. [...]Also, maybe on the web page that I went to check before the interview... (2\_A2).

In the discussion of how well the interpreters know the goals of the Village, the following responses were given to the first interview question (What are the goals of your heritage village?):

To provide an opportunity for children, adults, seniors, everyone to understand what the past was like and to understand what the things were like in 1914 (2\_A2).

For us the goal is to preserve that bit of history and to show it to the public (2\_A1).

I can't say a clear cut of goals, but these will be my two guesses: educate people about history and to preserve history through artifacts (2\_B).

To sum up, all three interviewees talked about presenting history to the public and two out of three interpreters also mentioned preservation as another goal of the site. Comparing the answers with the actual goals of Doon Heritage Crossroads, it can be said that the interpreters are fairly well informed about the purpose of their job and the duties expected of them. Other goals of the village such as collection, research, and maintenance were not mentioned.

An interesting fact was revealed during the interviews when the manager and one of the interpreters were talking about providing good customer service as one of the goals of the Village:

When we train our staff, we are less concerned about making sure that they have all the historical detail but we are more concerned that they are friendly, good customer service, pleasant [...] This is a part of the mission to have those things in place (D\_M).

We want to be the best museum; we want to offer good service (2\_A1).



The fact that representatives from both sides talked about customer service suggests that, although this goal has not been documented among the other goals, it plays an implicitly important role in the day-to-day operation of Doon.

### Goal implementation

Both the manager and interpreters believe that everything the front-line staff does implements the goals of their Village:

Everything they do in many ways, more than people in the office do, conveys to the general visiting public on the goals (D\_M).

...really it's just talking to people. This is how we implement it [...]. Of course with the kids it's the set programs that we do (2\_A2).

Acting period appropriate as much as possible is seen by the interpreters as an important part of goal implementation mostly because this element of their job was strongly emphasized during the orientation training:

They communicated it: you are not supposed to have anything on a site that's not period appropriate (2\_A2).

Another way in which the goals are being implemented is by means of continuous learning through additional readings:

...making sure that I know the correct facts, making sure if I talk about the store, that I've done some reading on the store, so that when people ask me questions, I answer (2\_B).

Other interpreters also mentioned doing reference reading when they have free time in between school programs and occasional visitors.

## Performance evaluation

The evaluation of interpreters' performance at Doon Heritage Crossroads happens twice during a 4-month season and is based on the evaluation process for co-op students required by universities, since almost all interpreters are students in their work term. The first evaluation is done early in the season to make sure that an interpreter implements his/her job correctly. A representative of the programming staff – the supervisor of programs or the education coordinator – watches each interpreter administering a school program and looks at the following:

...your presentation style, how you're interacting with children, how you are dealing with disruptive children, the historical information you've got, factualism.... what you are saying that we asked you to say (D\_M).

Then there is a meeting with each interpreter where all these issues are discussed. If there is a problem, the coordinator and the interpreter talk about how the performance can be improved.

Another evaluation and a formal "sit down" takes place at the end of the season; "they call it an exit interview; just to say that we've been doing good, if they want to hire us back and so on" (2\_B). At the same meeting, interpreters are usually being asked for feedback:

...so what do you think about the training, did we train you the right things, what did you need to know that we didn't tell you? So there is a whole sort of back and forth at the end of the four month (D\_M).

Table 2: Checklist: Communication at Doon Heritage Crossroads

| <b>Elements of communication strategy</b>                         | <b>YES</b> | <b>NO</b> | <b>Details</b>   |
|---|------------|-----------|--|
| Formal training/orientation provided                              | √          |           | Week-long  |
| Demonstration tour is a part of the training                      |            | √         | At the time of orientation, the previous season is over and trainees do not have an opportunity to watch life interpretation   |
| Reading materials provided  | √          |           | Seasonal Staff Manual, Educational Manual, and manuals for each building. Also, an access to the research materials  |
| Continuous training provided                                      |            | √         | “Follow ups” about some technical issues are possible  |
| One-on-one meetings with the manager are common <sup>5</sup>      | √          | √         | There is no official need for this type of meetings, but one-on-one encounters happen during a day and possible questions and tasks can be discussed at that time                |
| Active e-mail communication                                       |            | √         | Emailing is not necessary  |
| Bulletin board/ mail boxes exist(s)                               | √          |           |  |
| News-letter exists  | √          | √         | Seasonal newsletter exists; however, it is not oriented on interpreters and does not include internal messages and announcements   |
| Team meetings held on a regular basis (weekly/biweekly/monthly)   | √          |           | 10-min meetings are twice a day  |
| Managers provide feedback on a regular basis (daily/weekly)       | √          | √         | Because of the frequent encounters with interpreters, there is an opportunity for managers to provide feedback often. However, the feedback is mostly provided after evaluations |
| Interpreters provide feedback on a regular basis (daily/weekly)   | √          |           | During evening meetings the feedback about the daily activities can be provided  |
| Interpreters are aware of the goals of a site                     | √          |           | Interpreters know the goals of preservation and presenting heritage to the public; however, other goals (collection, research, and maintenance) were not mentioned.              |
| Performance evaluation is regularly conducted (seasonally/ early) | √          |           | Twice during a season (4 month)  |
| Interpreters participate in the planning of activities & events   |            | √         | Interpreters perform the activities that were already planned ahead of time and that can be found in the Educational Manual  |

<sup>5</sup> When both YES and NO are check marked, the scenario is possible but normally is not performed.

### Daily routine

Interpreters' daily routine consists of the following standard elements and occupy most of their time: educational programs, interpretation for general public, special projects, housekeeping work, preparation for future programs (such as baking), reference research reading, and, if there is still time left, socializing with peers. Often, it does not matter what interpreters do as long as the main rule is implemented:

They ask that we do period appropriate activities, e.g. we can play horse shoes because technically it's period appropriate (2\_B).

#### **4.1.4 Observations at Doon Heritage Crossroads**

Checklist: Interpretation at Doon Heritage Crossroads

Interpreters provide analogies with day-to-day life of visitors

|  |
|--|
| always – most of the time – <b>sometimes</b> – never |
|--|

Comment: Only some of the interpreters relate their interpretation to the day-to-day lives of visitors. This might be explained by a lack of experience and nervousness since most of the employees are students, or by a lack of training or scripting in this area. In addition, at some of the buildings it is easier to draw analogies with modern life than in others (e.g., at the barn, old breeds can be compared to present-day animals). While many artifacts do not require much explanation and comparison (e.g., old German Christmas tree), some of artifacts, such as a shoe button-hook, may be missed without an interpreter to point them out.

Interpreters engage visitors in their interpretation

always – most of the time – **sometimes** – never

Comment: Interpretation for adults may not seem very engaging because there are few interactive activities during the regular season with which adults can be involved. Holidays, however, offer more opportunities for interaction. For example, during the Christmas special events visitors were able to take a wagon ride and to sing Christmas songs with a chorus.

Interpreters ask questions

always – most of the time – **sometimes** – never

Comment: Most of the interpreters start with giving general information about the building and its owners and then, if visitors are interested in something in particular, answer the questions. Overall, visitors are the ones asking questions.

Interpreters recognize the needs of different age groups and adjust interpretation accordingly

always – **most of the time** – sometimes – never

Interpreters use time appropriate tools and dress up accordingly

**always** – most of the time – sometimes – never

Interpreters are available at the site

always – most of the time – sometimes – never

Comment: Some buildings on the site do not have interpreters but they are open for visitors to come in and see the exhibition. The main buildings, at the same time, have one and sometimes two interpreters.

Amount of information provided

5 4 3 2 1

Comment: Interpreters approach visitors as soon as they come into a building and give a short introduction to the place. Then, depending in a certain reaction (some visitors do not like to ask questions and want to be left alone), they either let visitors explore the building on their own, or follow them and answer their questions. The amount of information provided by interpreters directly depends on the interests of a visitor. During my visits, for example, the blacksmith neither greeted nor talked to visitors unless he was called upon.

Overall perception of the site<sup>6</sup>

5 4 3 2 1

Comment: On one hand, visitors have the freedom to walk around the village at their own pace, to visit buildings in which they are interested, and to have access to most of the

---

<sup>6</sup> 5 – excellent, 4 – good, 3 – average, 2 – poor, and 1 – bad

displays. On the other hand, the experience that visitors gain is more observational rather than interactive.

#### **4.1.5 Summary**

To sum up, as a result of manager-interpreter goal communication at Doon Heritage Crossroads, interpreters are aware about the goal of presenting history to the public and the goal of preservation of artifacts. However, other goals such as collecting and researching artifacts and archival materials, maintaining the buildings, and advising the general public about the preservation of culture and heritage were not mentioned by the interpreters. The lack of knowledge can be explained by the fact that interpreters of Doon Heritage Crossroads do not participate in most of these processes and are only responsible for the interpretation on the site. The interviews also revealed that an implicit goal – good customer service – is greatly emphasized by the management during the orientation training and later in the season through continuous reminders.

As a result of conducting on-site observations, the overall perception of the interpretation at Doon Heritage Crossroads is 4 out of 5 since interpreters pay enough attention to visitors and are able to provide them with new information; at the same time, the interpretation is not always interesting or engaging.

#### **4.2 Westfield Heritage Village**

Westfield Heritage Village (Westfield) is another living history museum that recreates rural life during five different historical periods: 1775-1825, 1825-1850, 1850-1875, 1875-1900, and 1900-1925. Westfield has a long history itself: it was first open to

the public in 1964 as a community project initiated by two school teachers from Brantford. The first building in the village was the 1896 Jerseyville station of the Toronto, Hamilton and Buffalo Railway. Throughout its more than 40-year history, Westfield acquired many other buildings and became one of the biggest living history museums in the region. Interestingly, operation and interpretation in the village is done entirely by volunteers, who are organized and coordinated by only four full-time and two part-time staff. Volunteer base is the major difference between Westfield and similar living history museums in the Southern Ontario.

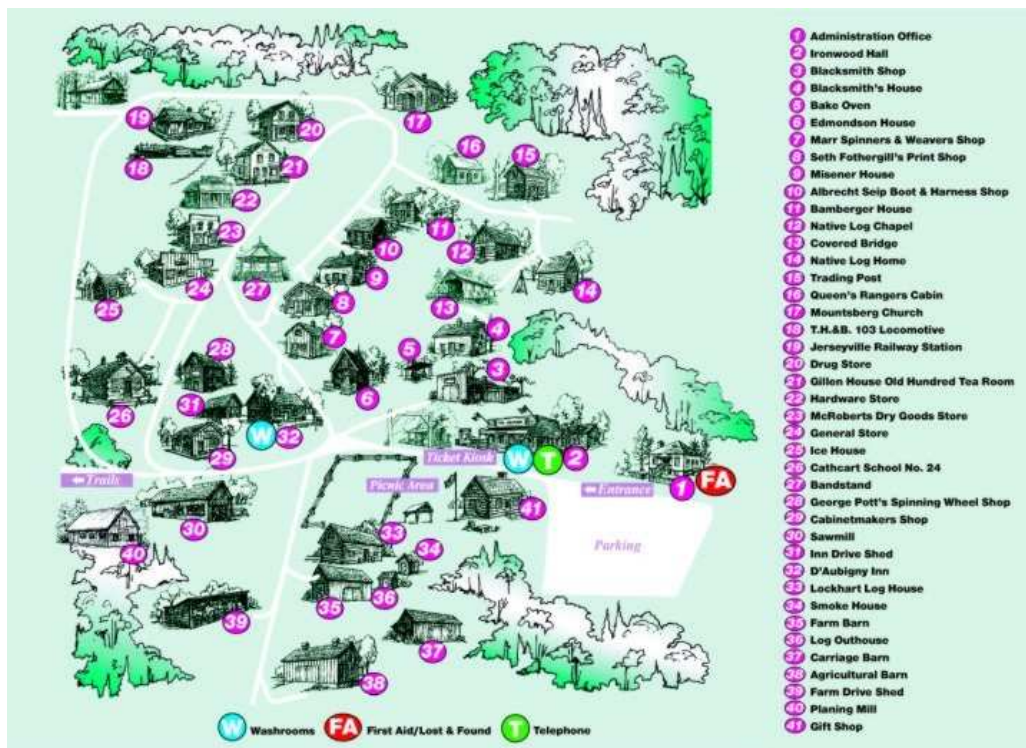
Even though costumed third-person interpretation dominates in Westfield, I encountered first-person interpretation creatively presented by one of the volunteers who introduced himself as Capitan Charles, the head of the Queen's Rangers, and who kept "in character" while I was challenging him with naive questions about different tools in "his" log cabin.

The gates of Westfield are open to the general public every Sunday and holidays from March until the middle of December; special events are also hosted only on weekends; whereas school programs are run year round during the week. Other services such as weddings and private visits are available by appointment throughout the year.

School programming is organized by a specific group of volunteers whose background is usually teaching. Generally, school programs at Westfield are presented the same way as those at Doon Heritage Crossroads. Special events include some traditional and popular ones such as Ghost Tours, Haunted Halloween, and 'Twas the Night Before Christmas, as well as some new events, e.g., Maple Syrup Candlelight Special on the 50'th anniversary of the Hamilton Conservation Authority.



Figure 6: Map of Westfield Heritage Village



(source: <http://www.westfieldheritage.ca/index.htm>)

A new special event – Maple Syrup Festival – was presented to the public in March. During their visit, guests participated in the process of making maple syrup in three different time periods (how it was made in the 18<sup>th</sup> century by Canada's First Nations, in the early 19<sup>th</sup> century by pioneers, and in modern times) and used and compared techniques and tools appropriate to each of the periods. Westfield used to regularly hold battle re-enactments, now they are only held occasionally (e.g., this year Battle of Culloden<sup>7</sup> was performed as a part of the Victoria Day celebration). Additional information about Westfield Heritage Village is summarized in Table 3.

<sup>7</sup> This battle took place in Scotland in 1746.

Table 3: Westfield Heritage Village - summary

|                                     |  |
|-------------------------------------|--|
| <b>Name of the site</b>             | <b>Westfield Heritage Village</b>  |
| <b>Type of the site</b>             | Living history museum  |
| <b>Location</b>                     | Rockton, Ontario   |
| <b>Owner</b>                        | Hamilton Conservation Authority  |
| <b>Operating budget</b>             | Unable to obtain   |
| <b>Number of visitors</b>           | 31,000 visitors in 2006 and close to the same amount in 2007   |
| <b>Period of history</b>            | 5 periods of history: 1775-1825, 1825-1850, 1850-1875, 1875-1900, and 1900-1925  |
| <b>Number and type of buildings</b> | <p>34 buildings + locomotive</p> <p>Type of buildings: regular houses, railway station, church, native log chapel, barns, general store, drug store, dry goods store, blacksmith shop, print shop, cabinetmaker's shop, boot and harness shop, ice house, smoke house, hardware store, inns, trading post, sawmill, school</p> <p>Additional buildings and constructions: Ironwood Tea House (restaurant/lunch facility), administration office, gift shop, covered bridge, bake oven, bandstand</p>   |
| <b>Interpreters</b>                 | <p>All interpreters are volunteers.</p> <p>Mostly people on their retirement, however there are also youth and children.</p> <p>About 250 volunteers engaged in different jobs on the site; 30-40 of them are very active</p>  |
| <b>Type of interpretation</b>       | Costumed third-person interpretation primarily, occasionally – first-person  |
| <b>Programs</b>                     | <p>School and public programs are offered regularly.</p> <p>Special programs and events vary and may include:</p> <ul style="list-style-type: none"> <li>- Statutory holidays celebration: Family day, Canada Day, Victoria Day (British battle re-enactment),</li> <li>- Festivals: Maple Syrup Festival, Annual Ice Cream Festival</li> <li>- Christmas events: 'Twas the Night Before Christmas, Moveable feast, Christmas table</li> <li>- Other special events: Strawberry Social, Ghost Tours, Haunted Halloween</li> </ul> <p>Additional services: weddings</p> |

Figure 7: Westfield Heritage Village: Entrance



Figure 8: Westfield Heritage Village: interpreting the Seth Fothergill's Print Shop

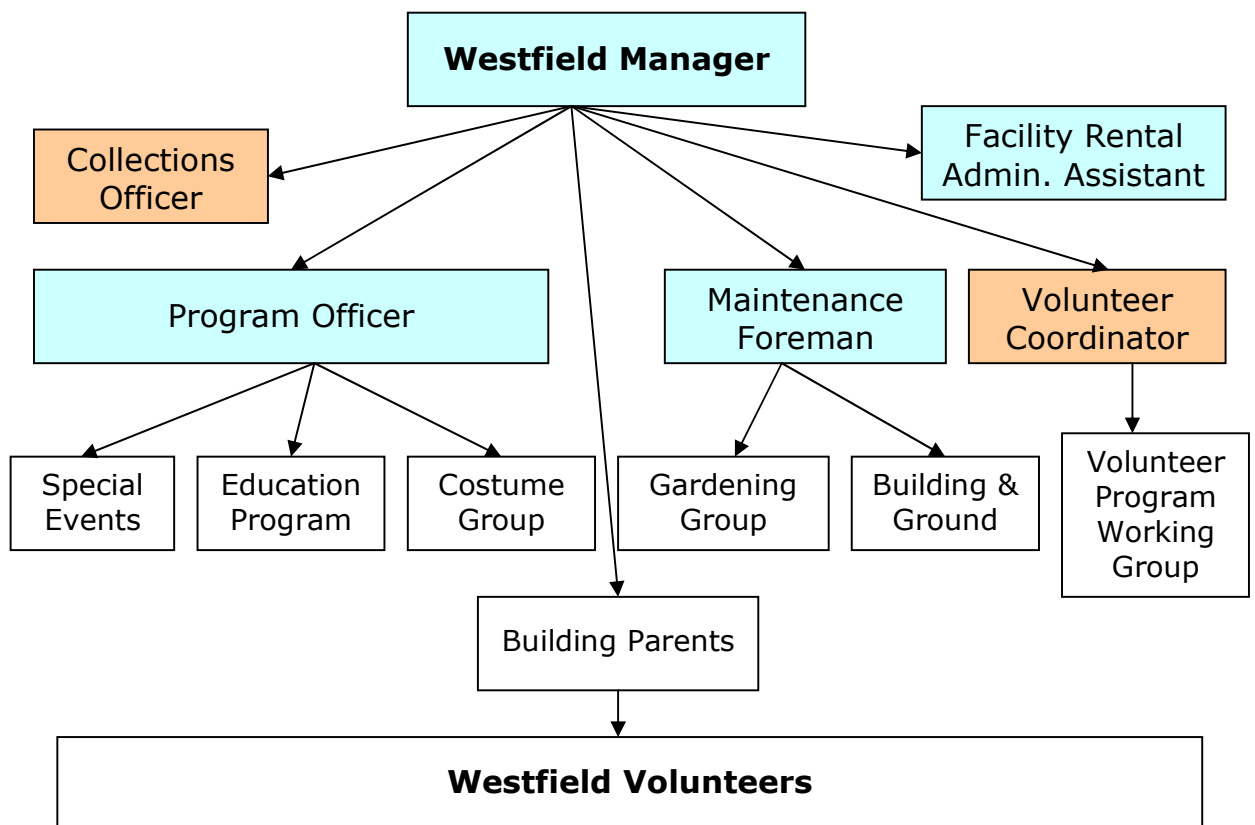


(source: Photos taken by the researcher)

#### 4.2.1 Management structure

The operation of and interpretations at Westfield are based entirely on volunteers, and only four full-time and two part-time staff organize and coordinate the volunteers (management structure of Westfield Heritage Village is represented in Figure 9). Full-time positions include Westfield Manager, Facility Rental Administrative Assistant, Program Officer, and Maintenance Foreman (highlighted in green); Collections Officer and Volunteer Coordinator are two part-time positions (highlighted in pink).

Figure 9: Management structure of Westfield Heritage Village



The Special Events Group organizes events on the site, the Education Program Group plans and implements school programs, and the Costume Group is responsible for making costumes for interpreters. These groups consist of volunteers and report to the Program Officer who also holds additional meetings with these groups depending on what questions need to be decided. The Maintenance Foreman heads the groups that are very important for the operation of Westfield because they provide maintenance and do gardening on the site.

Building Parents are volunteers who are responsible for particular buildings in the village; a building parent “keeps an eye” on the building and its artifacts, and also schedules other volunteers assigned to the building. It should be noted that the same volunteers can be involved in a number of groups and can perform a number of jobs (e.g., gardening, maintenance, construction, collections management, public and school programming, fundraising) depending on their personal availability and interests.

#### **4.2.2 Site documents**

Documents obtained at Westfield Heritage Village: the draft of the Master Plan, Volunteer Handbook, and two issues of the Village Chronicle.

Master Plan (serves as a Management Plan) provides the vision statement and objectives of Westfield Heritage Village (quoted in 4.2.1.1) as well as other information related to the operation of the site: management structure, description of the facilities and public participation opportunities. Unfortunately, I was able to obtain only the draft of a Master Plan as the manager could not find the actual document.

Volunteer Handbook contains general information about volunteering at Westfield, brief description of the positions and responsibilities, vision statement and objectives of the village as well as specific instructions about housekeeping and handling of artifacts.

*The Village Chronicle*, the Westfield's bimonthly newsletter, is a very important communication tool. Since it is almost impossible to contact all 250 volunteers by phone (and most of them do not have emails), a serious challenge for the management is to inform everyone about upcoming events and to invite for volunteering at these events. *The Chronicle*, in its part, serves as a bulletin board. Therefore, the newsletter usually contains announcements of the events, news, and other information that may be important and useful for volunteers. I was able to obtain two issues of the *Chronicle* from March 2004 and September 2007.

#### **4.2.2.1 Vision statement and objectives**

Westfield Heritage Village has the following vision statement:

To foster an appreciation of the Cultural and Natural Heritage of the City of Hamilton and this area of southern Ontario among local residents and visitors to the area through heritage restoration, collections management, creative programming and natural areas protection.

In other words, the purpose of the village is "to preserve the history of this area by restoring historic buildings, collecting artifacts, keeping alive the skills and trades of an earlier time and recreating the lives of people in this area from 1790-1925" (from other correspondence with the manager).



The fulfillment of the vision statement is planned to achieve through the following objectives:

1. To utilize, protect, preserve and exhibit the existing resource base on site – the natural setting, the artifact collection, heritage buildings and site features such as trails.
2. To provide visitors with a setting reflective of southern Ontario, in which our heritage can be experienced and appreciated.
3. To provide a range of interpretive, educational and passive recreational programs.
4. To provide opportunities for community involvement and to encourage co-operative programs with other appropriate groups.
5. To continue to develop a viable cultural tourist attraction for the city of Hamilton and local area.
6. To acquire and preserve artifacts as required and to maintain them according to recognized standards.
7. To create a better understanding of the inter-connectiveness of the cultural and natural environment of the site.

#### **4.2.3 Interviews at Westfield Heritage Village**

##### Communication on the site

With approximately 250 volunteers, some of which come almost every day and some occasionally, manager-interpreter communication can be an issue of concern for Westfield Heritage Village especially when it comes to organizing large events that require much help. It is even more complicated by the fact that the majority of volunteers do not use email. In this situation, the main way of communication on the site is a bimonthly newsletter, *The Village Chronicle*:

The big instrument is the newsletter, and I know that the essentials are definitely there, especially the upcoming events and requests for people to help (1\_M).

Everything that should be communicated to all volunteers is printed in the *Chronicle* and it is hoped that they will read it.

When interpreters come in the morning, they are supposed to go through the office building where they sign up in a signing book and pick up their costume. This allows management to meet interpreters at the beginning of the day and to communicate up-to-the-moment news. However, a number of volunteers have their own costumes and do not spend a lot of time in the office; they just go straight to their buildings. Moreover, there are no official daily or weekly meetings between managers and interpreters. Extra meetings and trainings only take place within the Education Program Group:

As a school group of people – we have more meetings. They [Program Officer] put together the program outline and we have a meeting where we discuss it (1\_B).

However, according to the manager, “when volunteers are on site they will always come in contact with at least one staff member somewhere, but unofficially” (W\_M).

In terms of other ways of communication on the site, workshops and special meetings through the year can be considered. Workshops are meant to provide additional training for interpreters:

... we sometimes have a speaker come in to talk about a specific topic, we also have our own volunteers to do a workshop if they have a special skill that they want to share (W\_M).

Special meetings are dedicated to the discussion of upcoming events. For example, when a Maple Syrup Festival was planned for April, at the beginning of February all volunteers were invited to discuss the details. As well, a general meeting for all volunteers – a Volunteer Forum – happens once a year, usually in February, as a part of the preparation for a new season:

This is just a meeting to talk about what we are planning for the upcoming year and get their [volunteers] feedback (W\_M).



They will present to us what happened here last year, all the numbers. They will tell what projects are going to be this year, maybe we can help them with something (1\_B).

To sum up, manager-interpreter communication at Westfield Heritage Village consists of the following: the newsletter; unofficial and unregulated everyday encounters on the site; occasional meetings during a year; and the Volunteer Forum, a large yearly event. A need for more manager-interpreter meetings, and a reason for why they probably do not happen, was expressed in one of the interviews:

The ideal would be to have more training and more information sessions, but when you are dealing with volunteers, they are not always willing to show up (1\_M).

In addition, “Timing is a big issue too. How much time can they spend on training sessions, how free are the volunteers?” (1\_M).

### Goal communication

The following methods are used by the management to communicate the goals of Westfield Heritage Village: Volunteer Handbook, Master Plan, and orientation session.

The vision statement and objectives appear in the Master Plan and on the first page of the Volunteer Handbook. Old issues (2004 and earlier) of the *Village Chronicle* also used to contain the vision statement on their front page, right under the title. However, according to the manager, because of the new design of the *Chronicle*, the vision statement is not there anymore.

Goals of the Village are also briefly covered during the yearly, half-day orientation sessions. The main purpose of these sessions is to make new volunteers familiar with the Village and its organizational structure, different volunteer

opportunities, safety issues, costuming, schedules, and village policies. At the end of the day, there is usually a short tour of a site. In addition to the orientation, new volunteers “usually go to about four different buildings for one day and see how they like it” (W\_M) and then choose the place in which they would like to work.

The orientation has two main drawbacks. First, only new volunteers participate in the orientation, and those who join the village later in the year have missed it and usually do not attend the next annual one. Second, neither during the orientation nor later in the year are the volunteers taught the techniques and principles of interpretation and communication with the visitors.

With respect to the effectiveness of communication, two interviewees believe that, in general, communication on the site is effective because “it is certainly the open door policy” (1\_D) and managers are very responsive:

I feel they are successful here, they are willing to try some new things, listen to ideas that are presented (1\_B).

However, nothing was said specifically about goal communication which could mean that goals are not being emphasized with the interpreters on a daily basis. This suggestion is somewhat corroborated by the manager, who believes that goal communication at Westfield is not effective enough because 1) at the orientation session “we talk about it [goals] briefly” (W\_M); and 2) even though the goals are printed in the Volunteer Handbook and Master Plan, “...if you asked them to quote the mission statement, they won’t be able to quote it, even where to find it” (W\_M).

An interesting position was expressed by the third interviewee who believes that management does a fine job of making the goals available, and that is the responsibility of an interpreter to learn about these goals:

If you really want to know, then you'll find out and there are ways to find out; if it's not your interest, you can walk in and just miss all of that and not be aware of the history of the village and the goals (1\_M).

In addition, the same interviewee believes that how well interpreters know the goals of the village depends on how they entered volunteering at Westfield:

If someone came as a volunteer because they like the idea of having something to do and dressing up and be out there, they may not investigate the real goals (1\_M).

Talking about the site's goals, the following responses were given to the first interview question (What are the goals of your heritage village?):

The original goals were to establish the village that would share with the general public and with school children especially life up to 19 century [...] And the big goal is a hands-on experience so when the visitors come, they don't just sit and listen (1\_M).

...to present the history of this country, of the village in this case (1\_D).

I know what we are trying to do here is to present to the public an honest interpretation of the period of time, tell about some of the buildings, some of the life styles, about pioneer life here in Ontario from a rural community aspect (1\_B).

Summarizing the responses, all interviewees talked about the goal of presenting period life to visitors; this can be compared to Westfield's second objective ("to provide visitors with a setting reflective of southern Ontario, in which our heritage can be experienced and appreciated"). The third objective ("to provide a range of interpretive, educational and passive recreational programs") was also partly mentioned by one of the respondents who talked about the goals of providing hands-on experience for visitors. The goals of

collecting and preserving artifacts, maintaining buildings, involving the community, and developing a tourist attraction were not mentioned.

### Goal implementation

According to the manager, the goals of Westfield are first interpreted and then implemented through programming:

In a lot of ways we interpret the written goals and say in this building this is what we are going to do (W\_M).

As well, interpreters see the implementation of the site's goals through the development of new programs and the teaching of school children. The interpreter's background and knowledge gained in the previous occupations is seen as an asset for adequate goal implementation:

I guess it's because I know what the curriculum says about the goals of this particular unit, so I try to see if the program really fits these goals (1\_M).

Gaining additional knowledge on the topic of the interpretation, especially for the school programming, is seen by the interpreters as another way of implementing the site's goals:

If I'm dealing with the school kids, there is a little bit more knowledge I think that you have to look at. You have to be flexible; we have a few more meetings (1\_B).

### Performance evaluation

Performance evaluation at Westfield Heritage Village is not being conducted because "there is no time to do that very effectively" (W\_M); however, the manager affirmed that unofficial monitoring still takes place:

We [management] do work with them, staff works with them, we are also monitoring but not officially (W\_M).

A need for an official performance evaluation was expressed by one of the interpreters:

It would be a great idea to actually sit down with the volunteers and actually have an appraisal [...]It would be good if it could happen annually: they would sit down and tell you: good and bad (1\_M).

The same interviewee gave the reasons why it may be difficult for Westfield to conduct such evaluation regularly. First of all, “it requires, that the staff and the program officer has the time to go around and observe you in action” (1\_M); and second, volunteers may be intimidated by evaluations and this, as a result, could affect their participation.

#### Daily routine

At the time of my on-site visits, the Village was not very busy and I have seen interpreters visiting each other’s buildings or just walking around. However, according to the manager, this is only permitted when there are two or more people working in the same building. Otherwise “they have to be in their building and they have to wait if somebody [a visitor] comes around” (W\_M). Besides that, the daily routine usually includes cleaning of the building, preparing for upcoming programs, and doing certain jobs (e.g. in the cabinet making shop interpreters make different tools, cabinets or other furniture; in the grocery store they sell candies and souvenirs). Overall, both the manager and the interviewees talk about being on site as being “at home”:

They are there [in the buildings] like being at home, so there is always stuff that they can be doing. They are really dedicated (W\_M).

Table 4: Checklist: Communication at Westfield Heritage Village

| <b>Elements of communication strategy</b>                                    | <b>YES</b> | <b>NO</b> | <b>Details</b>  |
|--|------------|-----------|---|
| Formal training/orientation provided   | √          |           | Half-day orientation.   |
| Demonstration tour is a part of the training                                 | √          |           | New volunteers stay in up to four different buildings for one day and learn the interpretation of these buildings from mature interpreters  |
| Reading materials provided   | √          |           | Volunteer Handbook. Also a large library with research materials available for volunteers   |
| Continuous training provided   | √          |           | Workshops are held in average twice a year. A guest speaker or one of the interpreters share a special knowledge or skill   |
| One-on-one meetings with the manager are common                              |            | √         | One-on-one meetings are not common but possible in certain circumstances  |
| Active e-mail communication  |            | √         | Not many volunteers have emails; however, those who have emails are being notified by an email  |
| Bulletin board/ mail boxes exist(s)  | √          |           |   |
| News-letter exists   | √          |           | Issued bimonthly and oriented on volunteers   |
| Team meetings held on a regular basis (weekly/biweekly/monthly)              |            | √         | A team meeting (Volunteer Forum) is held once a year  |
| Managers provide feedback on a regular basis (daily/weekly)                  |            | √         | There is no official instructions to provide feedback to interpreters   |
| Interpreters provide feedback on a regular basis (daily/weekly) <sup>8</sup> | √          | √         | Interpreters have an opportunity to provide feedback through informal interactions with the staff; however, there are no official conditions (meetings/ forms) to provide feedback on the regular basis                 |
| Interpreters are aware of the goals of a site                                | √          |           | Interpreters know the goals of presenting history to the public and developing interactive programming; however, other goals (e.g., collection and preservation, maintenance, community involvement) were not mentioned |
| Performance evaluation is regularly conducted (seasonally/ early)            |            | √         | Evaluation is not conducted. The reason declared: the lack of time to do it effectively. Unofficial monitoring is conducted   |
| Interpreters participate in the planning of activities & events              | √          |           | Some interpreters (most active volunteers) plan activities and events and then invite other interpreters discuss the details and their feedback.  |

<sup>8</sup> When both YES and NO are check marked, the scenario is possible but normally is not performed.

#### 4.2.4 Observations at Westfield Heritage Village

##### Checklist: Interpretation at Westfield Heritage Village

Interpreters provide analogies with day-to-day life of visitors

always – most of the time – **sometimes** – never

Comment: Only some of the interpreters relate their interpretation to the day-to-day lives of visitors. Overall, interpretation at the village is limited to the simple explanation of artifacts.

Interpreters engage visitors in their interpretation

always – **most of the time** – sometimes – never

Comment: If a specific building allows, visitors are offered to try old-fashioned tools (e.g., for woodcutting or fine printing).

Interpreters ask questions

always – most of the time – **sometimes** – never

Comment: Interpreters engage in conversations easily and may ask questions; however, frequently such questions are not related to the visitors' experience of the village. Rather, they are typical conversation starters like "Where are you from?" or "Nice weather, isn't it?"

Interpreters recognize the needs of different age groups and adjust interpretation accordingly

always – most of the time – sometimes – never

Interpreters use time appropriate tools and dress up accordingly

always – most of the time – sometimes – never

Comment: Interpreters dress in costumes and most of them look time appropriate (e.g., no jewelry, no watch or old-fashioned watch on a chain); however, during my visits some period-inappropriate objects such as water bottles have been seen in the buildings.

Interpreters are available at the site

always – most of the time – sometimes – never

Comment: Even though volunteers are normally scheduled, there are days when some buildings stay empty and other interpreters have to take these buildings under their responsibility.

Amount of information provided

5    4    3    2    1

Comment: Some interpreters try very hard to be informative and interesting in their interpretation. Earlier I gave an example of “Captain Charles”, the head of the Queen’s Rangers, who stayed in character for the duration of my visit to his building. However, overall interpreters do not tend to approach visitors first, and unless a visitor asks a question, the conversation may not happen. In addition, during my visits I noticed less



interpretation and more ordinary or pleasant conversation between visitors and interpreters.

Overall perception of the site<sup>9</sup>

|   |   |   |   |   |
|---|---|---|---|---|
| 5 | 4 | 3 | 2 | 1 |
|---|---|---|---|---|

Comment: Westfield Village is a very large, beautiful, and quiet heritage site with a variety of buildings and a number of activities. However, there is a sense of awkwardness when a visitor enters a building and must be the one to ask questions in order to start a conversation with interpreters.

#### 4.2.5 Summary

The vision statement and objectives of Westfield Heritage Village are documented in a management plan available for interpreters to look at; they are also duplicated in a Volunteer Handbook that each new interpreter receives. As a result, interpreters are aware of the goals of presenting history to the public and developing interactive programming. Other goals of the site such as collection and preservation of artifacts, building maintenance, and community involvement were not mentioned during the interviews.

After conducting on-site observations, the overall perception of the interpretation at Westfield is 3 on a 5-point scale since the amount of information provided to visitors is not always enough, and the way the information is presented is not always interesting or engaging.

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<sup>9</sup> 5 – excellent, 4 – good, 3 – average, 2 – poor, and 1 – bad

### 4.3 Dundurn Castle

In 1984, Dundurn Castle (Dundurn) as well as the Hamilton Military Museum located in a neighboring building, other outbuildings, Kitchen Garden, and adjacent grounds were recognized by Parks Canada as Dundurn National Historic Site. The Castle obtained national status because of its architectural significance for Canadian heritage and because of its owner – Sir Allan Napier MacNab – a person very important to Canadian history. The Castle has been restored to represent MacNab’s life in 1855, when he, a lawyer, landowner, and railway magnate, was the Prime Minister of Canada<sup>10</sup>.

Dundurn Castle is more like a museum in a house, especially the main floor and the upstairs: visitors have only limited access to the rooms and cannot touch most of the artifacts. However, Dundurn can also be called a living history museum because, in the other areas – in the historic kitchen (basement) and in the Kitchen Garden – the life of 1855 is actually being represented by interpreters dressed and performing as servants of the Castle. Dundurn is open to the public year round, six to seven days a week, depending on the season, and, according to the curator, it is a very busy place: there may be just one day in the whole year when no one visits the House.

School programs are very similar to those at Doon and Westfield: they are also tied to the curriculum and include a number of interactive activities. Because of a close connection between the house and the garden, many special events have botanic themes, e.g., Straight from the Garden, an event with demonstrations of beer brewing and local food growing; Botanical Drawings at Dundurn Castle, another special event that teaches the art of 19<sup>th</sup> century Botanical drawing.

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<sup>10</sup> MacNab was the Prime Minister of Canada according to the plaque at Dundurn Castle; however, technically he was the Premier of the United Provinces of Canada.

Table 5: Dundurn Castle - summary

|                                     |   |
|-------------------------------------|---|
| <b>Name of the site</b>             | <b>Dundurn Castle</b>   |
| <b>Type of site</b>                 | National Historic Site<br>Historical house/museum   |
| <b>Location</b>                     | Hamilton, Ontario   |
| <b>Owner</b>                        | The City of Hamilton  |
| <b>Operating budget</b>             | Unable to obtain  |
| <b>Number of visitors</b>           | Unable to obtain  |
| <b>Period of history</b>            | 1855  |
| <b>Number and type of buildings</b> | <p>Dundurn Castle: 3 floors and about 40 rooms (not all of them are open) + Kitchen Garden and grounds</p> <p>Type of rooms:<br/>The main floor and the upstairs – rooms for the family and guests (e.g., bedrooms, tearooms, dining room, living rooms, halls, library, classroom)</p> <p>The downstairs: kitchen, basement, laundry room, brewery, storage rooms, living quarters for servants)</p> <p>Additional buildings:<br/>Military museum, Museum Gift shop, the Coach House (for corporate meetings and events), neighboring outbuildings</p> |
| <b>Interpreters</b>                 | About 12 part-time interpreters in the “house”, on the kitchen, and in the garden. 1 full-time garden coordinator/interpreter. No volunteers in the house, 2-3 volunteers help in the garden  |
| <b>Type of interpretation</b>       | Costumed third-person interpretation  |
| <b>Programs</b>                     | <p>School and public programs are offered regularly.</p> <p>Special programs and events vary and may include:<br/>e.g., Straight from the Garden, Botanical drawings, Victorian Christmas, Christmas Family Evening Tours</p> <p>Additional services:<br/>- Workshops (e.g., Fearless Gardener, Cooking workshops, Christmas Craft workshop).<br/>- Birthday parties for children<br/>- Music concerts in Dundurn park (e.g., An Evening in Scotland)</p>   |

Figure 10: Dundurn Castle: Front view



Figure 11: Dundurn Castle: neighboring buildings



(source: Photos taken by the researcher)

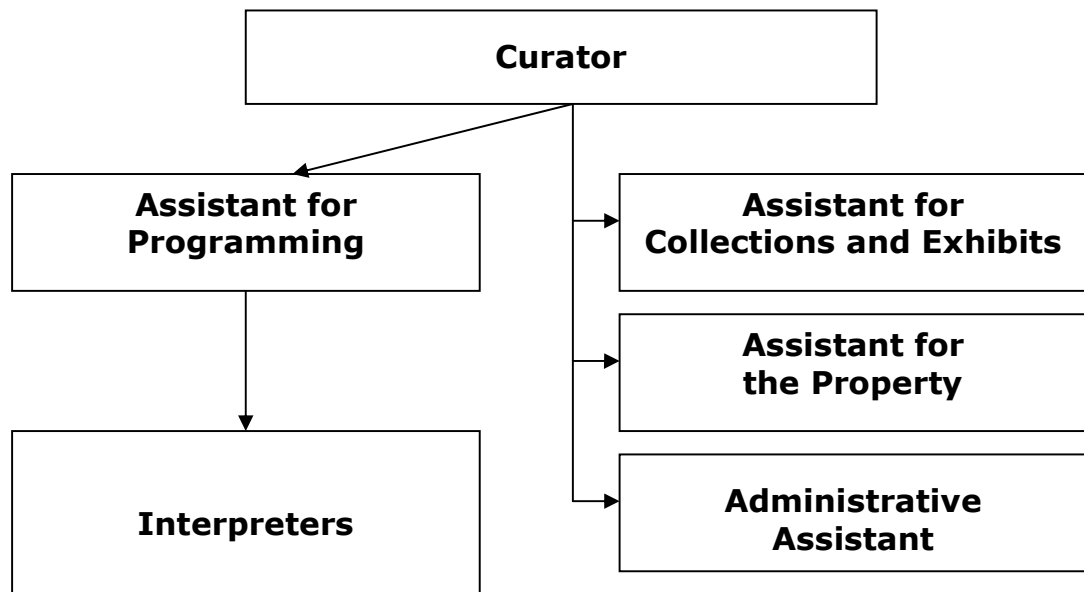
One of the main additional services that Dundurn Castle provides is diverse workshops. Gardening (Fearless Gardener) and 19<sup>th</sup> century cooking workshops take place every two weeks. Fearless Gardener is a series of workshops focusing on different types of work in a garden: grafting, pruning, choosing seeds, and planting. Cooking workshops take place in the historic kitchen and teach participants how to cook different dishes from foods available during certain seasons using only authentic 19<sup>th</sup> century recipes and supplies, e.g., Spring Greens, Medical Herbs, Christmas Baking workshops. Free music concerts held in Dundurn Park are another type of service offered by Dundurn Castle.

#### **4.3.1 Management structure**

The head of the management structure (Figure 12) in Dundurn Castle is a curator who has four assistants: Assistant for Programming, Assistant for Collections and Exhibits, Assistant for the Property, and Administrative Assistant. The Assistant for Programming is responsible for hiring, training, coordinating, and evaluating interpreters. In the present study this assistant is called manager for convenience. The Assistant for Collections and Exhibits does collection work and presents the results of new findings in staff meetings.

Among interpreters, there are two coordinator positions: Kitchen Coordinator and Garden Coordinator. Interpreters who are also coordinators do not manage other interpreters but, rather, make sure that the areas they are responsible for run smoothly: all the supplies are purchased and all the planned activities take place.

Figure 12: Management structure of Dundurn Castle



#### 4.3.2 Site documents

The only document obtained at Dundurn Castle was the Dundurn National Historic Site Commemorative Integrity Statement (CIS), dated May 1999. This is also the only document that currently governs the Castle’s operations.

CIS is required for each national historic site because it identifies what is nationally significant about the site and what messages about this significance should be communicated to the public. Specifically, the CIS of Dundurn Castle describes the land and its buildings, their historical background and architectural features; it also specifies the messages that are essential for an understanding of the site’s importance. For example, the main message states: “Dundurn is a place for national historic and architectural significance because it is a rare surviving example of a Picturesque estate in Canada.” The document provides the learning objectives for messages of national significance; and they all return to the same main message: “As many Canadians as

possible will know that Dundurn is a place for national historic and architectural significance because it is a rare surviving example of a Picturesque estate in Canada”.

It should be noted, that even though CIS provides the basis for managerial and planning documents, it is not a management document itself: it does not contain a goal statement, nor does it provide specific directions for future development.

An information package given to every new interpreter is called an Interpreter Manual. It is a big binder that contains the site’s CIS, museum policies (e.g., for public programming, exhibit development, admissions); and copies of archival materials related to the house, its owner and his family, and different artifacts in the house. The newsletter – *Dundurn Chronicle* – is published seasonally, three or four times a year, and contains the site’s news, announcements, and recently discovered archival information.

#### **4.3.3 Interviews at Dundurn Castle**

The fact that Dundurn Castle does not have specific goals documented in the Commemorative Integrity Statement or any other document made some of the questions not applicable to the interviewees at the Castle. However, one of the conditions of the research process was to ask the same questions at each of the sites. The responses received at Dundurn and presented here show that interpreters understood the questions and did not feel uncomfortable answering them.

#### **Communication on the site**

Because the Castle has limited space, the interpreters, coordinators, and the immediate manager have to share the offices and the common area. This makes everyday

communication at Dundurn continuous and “open to drop-in talks” (3\_M): “I can talk to my manager all day, every day, any day” (3\_J). As a result, together with the positive remarks about this ongoing interaction, a concern about the lack of privacy was also expressed:

In some way it might be better if the lay out of the offices was more formal, so that if you had a more serious concern, there would be more opportunity for private conversation (3\_M).

With regard to the formal communication between management and interpreters, monthly meetings are an important part of it. The meetings are broken into sections. First, different assistants responsible for different areas at the site report the news: new collections that are coming to the castle; construction work that is being undertaken; and the financial information – the numbers, so that “everyone can see how the site as a whole is doing” (Du\_M). Then the manager goes over the last month’s assignments with each of the interpreters: “what kind of program you are doing, what kind of programs you are developing – we’ll discuss that” (Du\_M). In addition, now a new segment of the staff meeting is being implemented in order to align the “story line” in each of the rooms with the messages that should be conveyed:

Together, we go to different rooms and talk about how we can get across the points of the Commemorative Integrity Statement in each room (3\_M).

The interviewees mentioned that with all these innovations the staff meetings became more engaging and interactive:

It’s better now – it is not so boring....They make us do something, present information (3\_J).



Finally, as an additional means of communication, the mailbox system is used by management for sending official notifications and schedules to interpreters:

We each have a little box and if there are any memos, or feedback that's been brought from the community, they will stick it to the mailbox (3\_M).

### Goal communication

Every new interpreter at Dundurn gets two weeks of training that includes reading the relevant documentation (e.g., CIS) and discussing it with the manager, watching other interpreters giving tours, and trying to come up with a personal way of presenting the information to the visitors:

During the training you are expected to follow some interpreters on the tour to learn the history, but you are also looking at behaviors (3\_J).

Because the number of employees is very small, each new interpreter gets one-on-one training with the manager who tries to explain “why we are a National historic site and what we do here” (Du\_M). The trainee also receives an Interpreter Manual with references and useful information:

[...] stuff that people picked up over the years, different tours that have been done – interpreters' nuts. It doesn't really have a heritage statement or a goal statement (3\_J).

All interpreters talked about learning about the goals of their heritage site from Commemorative Integrity Statement even though it only contains the message of national significance and the learning objectives and does not contain the actual goals. The CIS is given to every new interpreter during the training and its importance is stressed by the management. However, completely opposite positions regarding the Statement were expressed by the interviewees. On one hand, an interpreter believes that

“it is brought up frequently at staff meetings and in casual conversations” (3\_M). On the other hand, an interviewee doubts that “most people read it and understand it [...] it’s not something that’s talked about all the time (3\_J). Personal perception and different amount of time spent on the site may influence these two different points of view.

Interpreters noticed that the emphasis on goals has increased for the last several years:

It’s been more and more pushed in the past few years:  
build, go, write, develop (3\_J).

As a result of such a policy, “historic information that we pass on has been increasing – we restored the garden and now we have workshops every month in the kitchen, before we had one or two a year” (3\_J). The same interviewee offers a possible reason for these changes:

The Cultural Department, I think, has become more interested and has made a big financial investment in the garden, in the kitchen and in the staff to do the research (3\_J).

More programming ideas, new approaches to the staff meetings and overall active communication on the site give interpreters a feeling that the management communicates goals effectively:

I think she [the manager] tries really hard to encourage us, to remember the goals, to remember what we are about (3\_M).

The personality of the coordinator plays an important role in the perception of the effectiveness of communication: “She tries very hard so that we don’t get relaxed about things” (3\_J). At the same time, there is a certain amount of doubt about these endeavors:

How much the staff listens and does with communication is a separate subject. I think management tries hard (3\_J).

The manager, in her turn, hopes that her communication with the interpreters is as effective as possible; she tries to achieve it by telling the interpreters everything:

If it's good or bad I think they still need to know what is going on (Du\_M).

Even though the goals of the site are not mentioned in any of the existing documents, a fair number of responses suggesting the Dundurn's goals were given during the interviews:

Our goal is to engage with the public and the community as much as possible and to have to be integral parts of the interpretation of the site (3\_S2).

To have a life connection between the community and the site (3\_S2).

To highlight the fact that this building is remarkable in Canada (3\_M).

In addition, other goals such as protecting the museum resources and meeting curriculum objectives were mentioned as well. Summarizing the responses, the interviewees are familiar with the CIS and its main messages; they also have an understanding of the common goals of heritage sites such as preserving artifacts, involving the community, and providing educational experience.

### Goal implementation

The manager believes that the goals of the site can be considered implemented only when every visitor by the end of the visit would be able to describe the main message of the Castle. This is what interpreters should aim for; how they implement this task depends on the responsibilities at the site. Coordinators among the interpreters try to implement the goals through developing and running special programs:

One of programs we were introducing yesterday was a program that linked the house and the garden. And it had lots of various curriculum links (3\_S2).

The other way of implementing the goals mentioned by all interviewees is through reading and conducting research:

That makes job more interesting, because obviously I'm learning information that I can then integrate into my tour (3\_M).

Alternatively, being a part of a heritage association, keeping in touch with similar museums and sharing the information with other heritage professionals can be also considered a part of personal development:

I call other museums, and I go to other museums and I make recipes at other houses (3\_J).

### Performance evaluation

Official performance evaluation or – how it is called in Dundurn – performance appraisal takes place once a year. However, the manager affirms that “if there is an issue, I talk to them right away” (Du\_M). The appraisal procedure is divided into two parts. First, an official evaluation form is completed. Since Dundurn is operated by the City of Hamilton, a standard form is used to evaluate every City's employee:

We sit down and there are certain sections that we go through. They write down their examples and I write down my examples and then I give them a rating (Du\_M).

According to one of the interpreters, “nobody likes the format of the performance appraisal” (3\_J):

Staff is being intimidated when we have to do these appraisals because it is being judged” (3\_J).

Therefore, in the recent years more emphasis is given to the second part of the procedure when the manager and interpreter talk about the future programming and set the goals for the upcoming year:

We talk about what they want to do in the future: do they want to develop new program, do they want to do a special event (Du\_M).

This new, more personal, approach to the performance appraisal got positive responses and is perceived by interpreters as “an improvement over the last couple of years” (3\_S2).

According to the manager, in addition to the yearly appraisals, unofficial monitoring also takes place, especially with new interpreters:

I will go and listen to them on the tour, I will listen them on a school program so that I know how things are going in the house (Du\_M).

### Daily routine

Other than giving tours for visitors, interpreters at Dundurn can be busy with work in the office such as reference reading, developing new programs, or conducting research. The latter is a significant part of the daily routine at the Castle:

That’s certainly encouraged here by the managers that during our downtime we are doing research (3\_M).  
[...] and it’s wonderful: I do so much research, I learned tons of things (3\_J).

Special projects (e.g. crafts) are the other thing that interpreters can be busy with. The only condition that applies is that everything done must be period appropriate.

Table 6: Checklist: Communication at Dundurn Castle

| <b>Elements of communication strategy</b>                         | <b>YES</b> | <b>NO</b> | <b>Details</b>  |
|---|------------|-----------|---|
| Formal training/orientation provided                              | √          |           | Two-week training   |
| Demonstration tour is a part of the training                      | √          |           | Within the two-week training, a trainee is supposed to follow tours given by other interpreters   |
| Reading materials provided  | √          |           | Interpreter Manual. Also a large library with research materials available for interpreters   |
| Continuous training provided                                      |            | √         | Technically the continuous training is not provided, but interpreters are encouraged to make connections with heritage associations and other heritage sites  |
| One-on-one meetings with the manager are common                   | √          | √         | There is no official need for this type of meetings, but one-on-one encounters happen during a day and possible questions and tasks can be discussed at that time                                   |
| Active e-mail communication                                       |            | √         | Email communication is not necessary  |
| Bulletin board/ mail boxes exist(s)                               | √          |           |   |
| News-letter exists <sup>11</sup>                                  | √          | √         | 3-4 issues a year, and even though it is oriented on interpreters, it does not contain internal messages and announcements  |
| Team meetings held on a regular basis (weekly/biweekly/monthly)   | √          |           | Monthly meetings  |
| Managers provide feedback on a regular basis (daily/weekly)       | √          | √         | Because of the frequent encounters with interpreters, there is an opportunity for the manager to provide feedback often. However, the feedback is mostly provided during the performance appraisal  |
| Interpreters provide feedback on a regular basis (daily/weekly)   | √          | √         | Frequent communication with the manager give interpreters an opportunity to provide feedback; however, it is not officially requested from interpreters   |
| Interpreters are aware of the goals of a site                     | √          |           | Even though Dundurn does not have its goals documented, interpreters mentioned the following as the goals of their site: community involvement, educational experience, and protection of resources |
| Performance evaluation is regularly conducted (seasonally/ early) | √          |           | Once a year. Unofficial monitoring is also conducted.   |
| Interpreters participate in planning of activities & events       | √          |           | Interpreters and, especially, coordinators among the interpreters are responsible for program planning  |

<sup>11</sup> When both YES and NO are check marked, the scenario is possible but normally is not performed.

#### 4.3.4 Observations at Dundurn Castle

##### Checklist: Interpretation at Dundurn Castle

Interpreters provide analogies with day-to-day life of visitors

always – most of the time – sometimes – never

Comment: There is no specific script, but interpreters give the same information and make the same comparisons during each of the tours. The rooms in the Castle and different objects are usually compared to their modern equivalents (e.g., toilet system, laundry room, brewery).

Interpreters engage visitors in their interpretation

always – most of the time – sometimes – never

Comment: Visitors are mostly listeners on a tour. In addition, they are not allowed to touch most of the artifacts. However, sometimes visitors are also engaged in the interpretation (e.g., on the Historic Kitchen there is always some samples of food to try that is made in accordance with old recipes).

Interpreters ask questions

always – most of the time – sometimes – never

Comment: In almost every room an interpreter would point out an object and ask how it could have been used or what can it be made of. Questions are a significant part of a tour.

Interpreters recognize the needs of different age groups and adjust interpretation accordingly

always – most of the time – sometimes – never

Interpreters use time appropriate tools and dress up accordingly

always – most of the time – sometimes – never

Comment: Even flour that is used for cooking is not bleached (because this is the only type of flour available in 1850-s).

Interpreters are available at the site

always – most of the time – sometimes – never

Comment: Visitors to the Castle are never alone; there is always an interpreter giving a tour that usually takes from one to two hours. The size of a group differs and may be as big as just two people. To make sure that new visitors (no matter if they are alone or in a group) do not wait for more that 15 minutes, there are usually two groups having tours at the same time but on different floors.

Amount of information provided

5 4 3 2 1

Comment: Since interpreters give tours, are always around, and are ready to answer questions, the amount of information that visitors receive is maximized.



Overall perception of the site<sup>12</sup>

|   |   |   |   |   |
|---|---|---|---|---|
| 5 | 4 | 3 | 2 | 1 |
|---|---|---|---|---|

Comment: Visitors never walk around the house alone. On one hand, it is good because you will never completely escape the information that interpreter provides; on the other hand, more freedom may be desired in a museum like this. A group may have different interests and may move fast from one room to another, and a single visitor should have an opportunity to explore the place at his/her own pace.

#### 4.3.5 Summary

Dundurn Castle is the only study site that does not have its goal documented. Nevertheless, interpreters of Dundurn mentioned the following as the goals of their site: community involvement, educational experience, and protection of resources.

As a result of conducting on-site observations, the overall perception of the interpretation at Dundurn is 4 on a 5-point scale. On one hand, interpreters do a good job providing a large amount of information in an interesting manner. On the other hand, interpretation could be more engaging and more freedom to just walk around the house could be given.

#### 4.4 Chapter summary

The goal of this chapter was to summarize and describe the data obtained at the heritage sites using three different types of inquiry: secondary data collection,

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<sup>12</sup> 5 – excellent, 4 – good, 3 – average, 2 – poor, and 1 – bad

observation, and interview. Secondary data collection and analysis were the first parts of the research. They revealed that only Westfield Heritage Village holds an actual management plan with the vision statement and objectives in it. Doon Heritage Crossroads operates on the base of the Statement of Purpose issued for all heritage sites of the Region of Waterloo which still contains a paragraph with the purpose of the village. Finally, the main document of Dundurn Castle is the Commemorative Integrity Statement that provides the messages of national significance but does not include any reference to the site's goals.

Twelve interviews – 3 with managers and 9 with interpreters – were conducted and analyzed to attain some of the research objectives. During the analysis of interviews, five main themes were identified: communication on the sites, goal communication, goal implementation, performance evaluation, and daily routine. The interviews revealed that even though manager-interpreter communication at heritage sites can be very active, the actual goals are communicated to interpreters only through orientation and reading materials. Other elements of communication strategies of each of the sites are summarized in checklists for each of the study sites.

Finally, observations were conducted in order to become familiar with the sites and their interpretation practices. Following my three observations at each of the locations, the heritage sites were evaluated on a 5-point grading scale with five being the highest grade. The overall evaluations varied from 3 (Westfield) to 4 (Doon and Dundurn) and were mostly based on the amount of information provided by interpreters and the ways in which this information was provided.

## **5. Discussion**

The main purpose of this chapter is to discuss the research findings outlined in the previous chapter in order to combine them in a clear and unified picture. The chapter is divided into five sections with each section discussing a certain research objective.

### **5.1 Determining the goals of heritage sites**

According to the secondary data and interviews, having a management plan with goals for heritage sites appears to be an exception rather than a rule. Indeed, only one out of three sites studied in this research currently has its objectives documented in a management plan. Two other sites appear to have substituted the lack of actual management plans with other documents such as a Statement of Purpose or Commemorative Integrity Statement. And while the Statement of Purpose gives an idea of the purpose of a site and actual actions for its fulfillment, the Commemorative Integrity Statement provides only the message of the site's significance and nothing specific about the actual management actions.

The next question that comes to mind is "So what?" Can the lack of documented goals affect the site's performance? After conducting this research, I would say the answer to this question is "no". The fact that Dundurn – a National Historic Site that draws far more public attention than others – does not have a management plan supports such position. In addition, I have not witnessed any direct relationship between the presence/absence of documented goals and the interpreters' awareness of them during the interviews. For example, both managers and interpreters of Doon Heritage Crossroads talked about providing good customer service as a part of their site's mission; however,

nothing even resembling this goal is mentioned in their document – the Statement of Purpose. Moreover, interpreters from Dundurn answering the interview question about the goals of their site provided more answers than interpreters from Westfield, meanwhile the former does not have its goals documented and the latter does<sup>13</sup>.

At first glance, it may look that the previous paragraph contradicts the research idea and devalues the rest of the discussion. However, this is not the case. That the goals are not documented does not mean they are completely absent. The point here is that without even looking at the goals, interpreters instinctively answered the questions because all heritage sites fulfill similar functions and try to attain similar goals that are comprehensible from a common sense perspective. Even though these goals may slightly vary from site to site, the review of the documents and the interview data revealed that the main ones include:

- 1) To protect and preserve artifacts and other resources,
- 2) To research and adequately interpret history of a city/region, and
- 3) To provide educational and recreational experiences for visitors.

Other goals of heritage sites may be:

- 1) to provide opportunities for community involvement,
- 2) to collect and research artifacts,
- 3) to perform maintenance of buildings, artifacts, and other resources,
- 4) to advise general public on preservation of heritage, and
- 5) to provide a cultural tourist attraction.

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<sup>13</sup> This could also be influenced by the fact that one group is made up primarily of professionals and the other – of amateurs.

As can be seen in the Findings chapter, the answers that interpreters gave me were based on the understanding of these general goals of heritage sites. The discussion of how well interpreters are familiar with these goals follows.

## **5.2 Determining the means of goal communication between managers and interpreters**

In the previous chapter, as a result of summarizing the interview findings, two separate topics emerged: Communication on the site and Goal communication. Before conducting the interviews, these two topics were not distinguished from each other: any communication on the site was thought to be goal communication. However, the interviews revealed that even though overall manager-interpreter communication at heritage sites can be very active (the elements of this communication will be discussed further), the actual goals are communicated only through orientation and reading materials and only to new interpreters who just start working at the sites.

1) Orientation or training. What it is – a two-week long training or a half-day orientation – depends on the amount of information interpreters need to learn and the time that managers can allocate to provide training. The data obtained during the interviews shows that less time is spent by Westfield on training its volunteer interpreters than by the two other sites on training their employed interpreters. This can be explained the lack of time and resources available to the managers for training a large number of volunteers, some of which may only be volunteering periodically. In addition, new volunteers are never left alone in a building; they are often paired with other volunteers who have worked in a village for a while and who can provide training “locally.” Being

very hands-on, “local” training can save manager’s time and efforts and can greatly benefit new interpreters even though certain drawbacks such as the communication of incorrect information or bad habits are inevitable. How effective such training is and whether to use it or not is something that managers may wish to consider.

Orientation/training is the first activity that interpreters participate in, and, thus, it is a good opportunity for managers to convey the important information about a site and its goals effectively. At the same time, interpreters have to learn a large amount of information in a short period of time, so that some of this information gets forgotten relatively quickly. As it often happens, when trying to remember details, a person forgets the essentials. It was also noticed during the interviews that large amounts of information provided at the orientation are often confused by interpreters with the information about the actual goals. Therefore, more attention could be paid to alternative informational channels such as reading materials, team meetings, and daily encounters.

2) Reading materials. From the data collected at the study areas, two out of three sites include their managerial documents (or extracts from them) in the interpreters’ reading packages. The advantages of this method are that interpreters can take time reading over the information and they get to keep it and come back to it if needed. Among the disadvantages are that interpreters may read the information only once at the very beginning and never come back to it or they may even ignore it completely.

The third heritage site has its Statement of Purpose posted on the official website. In this case, with the same advantages and disadvantages mentioned above, the likelihood that the information may be completely ignored by interpreters may be higher because of

a lack of accessibility or the unwillingness to “go an extra mile” to seek additional information.

In contrast to goal communication specifically, overall manager-interpreter communication at heritage sites can be very active. At Doon Heritage Crossroads, for example, team meetings take place twice a day. As well, because of the Dundurn Castle’s lay out, interpreters share the common area with the manager and, thus, feel the constant contact: “I can talk to my manager all day, every day, any day” (3\_J).

Manager-interpreter communication includes the following: daily encounters, team meetings, newsletters, mailbox system or bulletin board, evaluations, and continuous training. Even though none of the mentioned is presently used by heritage sites to communicate goals to interpreters on a regular basis, each of the methods has a great potential to do so in the future. A comparison of the different communication practices of the three study sites and a discussion of how these practices can be enhanced with goal communication follow.

### **5.3 Evaluating the implementation of the goals by interpreters**

Interpreters are responsible for implementing only certain goals of their sites. To be precise, their major responsibility is site interpretation for the general public and school groups. Interpreters may be also partly involved in program development; research; artifact preservation, since they deal with artifacts in their buildings; and community involvement. Other goals of heritage sites such as artifact collection, restoration, as well as artifact and building maintenance are usually beyond the scope of interpreters’ responsibilities.

To understand the implementation of goals by interpreters, I conducted on-site observations. This method gave me enough data to evaluate the implementation of the main goal for which interpreters are responsible – interpretation of the sites. However, since I conducted my visits during regular public hours and behaved as a regular visitor would behave, I was not able to observe interpreters implementing other goals of their sites; therefore, I will not be discussing them in my research.

According to interpreters, the goal of site interpretation is being implemented through conducting public and school programming, hosting special events, gaining additional knowledge on the topic of interpretation, and dressing period appropriate. For visitors all these actions become visible through: 1) what interpreters tell about the site and the buildings; 2) how they tell it; and 3) how interpreters look.

First, it should be noted that interpretation at heritage villages differs from those at Dundurn castle. In the villages, *what* interpreters tell about the site is usually determined by the building they are in. General information about the owners is usually supplemented by background of some of the artifacts; and then interpreters either continue with answering questions or let visitors explore the rest of the house alone. From what I experienced during my on-site observations, interpreters begin by giving as much general information as possible. When they are done after a couple of minutes, a silent moment occurs because interpreters do not have anything further to say and visitors do not yet have anything to ask. Therefore, it may be more efficient for interpreters at the end of their interpretation to continue working on something: forging tools, feeding animals, or baking. This is also a point when interpreters could pose questions in order to alleviate the silence and engage visitors into the interpretation.



At some of the buildings of Westfield, the amount of information conveyed to visitors is minimal and mostly repetitious of what other interpreters have already said: how old the site is, from where the buildings were brought together, how many buildings, and so on. The tendency of interpreters to talk about the buildings in more general terms might be a result of the all-volunteer staff's lack of adequate training. Overall though, how much information, how interesting, and how engaging this information is vary from one interpreter to another and depend on the interpreter's experience, confidence, knowledge, and obtained training.

At Dundurn, the situation is different because the interpreters actually give entire tours, so they keep talking about a certain room in the castle until the group moves to a different room. In this case, the type and the amount of information that visitors receive are relatively similar and may vary only slightly from one interpreter to another.

*How* interpreters tell about the site is often even more important than what they tell. The proposed checklist (Appendix E) calls for such principles of interpretation as analogies with day-to-day life of visitors, adjustment of the interpretation to the different age groups, questions to visitors, and overall engagement of visitors in interpretation. During my observations, it was noticed that village interpreters provided less analogies and asked less questions than interpreters at the castle. This can be explained by the fact that interpreters at Dundurn have to keep visitors' attention for about an hour during a tour and for this purpose they try to use different attention-grabbing techniques that include asking questions to visitors and making comparisons with present time. As for engaging visitors in interpretation, Westfield seems to do a better job compared to the two other sites because it provides more interactive experiences. Most of its buildings

carry artifacts and tools that can be used by visitors. Conversely, at Doon and Dundurn visitors get more observational experience.

Finally, the way interpreters *look* is also an important part of interpretation. All three study sites are consistent with trying to be as period appropriate as possible, dedicating a lot of time and effort to conducting research on costuming and paying close attention to details. One site, however, did not adhere to as stringently to a code of appearance as the others. While period appropriate clothing was followed, some of the all-volunteer interpreters at Westfield could be seen carrying period inappropriate objects such as water bottles. The infrequency with which volunteers work at the site may be an explanation for why these kinds of small details are forgotten.

The overall site experience may also be influenced by the number of buildings that are open. Since the presence of interpreters is required for buildings to be open, interpreter shortage can be a problem. At Doon, this problem occurs very rarely because an adequate number of interpreters are initially hired. At Westfield, however, this problem seems to happen more often and may be explained by the fact that volunteers are not being paid and they are under less pressure to show up for work.

To sum up, site interpretation includes several crucial elements: the amount and the type of information presented; the way the information is presented; the way interpreters look; and the availability of interpreters. If all of these elements are not fully carried out, then the goal of effective site interpretation is not completely implemented. The weaknesses with an interpreter's performance can be and should be identified soon after a new interpreter starts working with the public. And if there is no opportunity to conduct full evaluation early enough, other ways of correcting the interpretation (e.g.,

monitoring and providing feedback) could be considered by management. All of my study sites perform relatively well in terms of the overall perception of their interpretation, varying from 3 (Westfield) to 4 (Doon and Dundurn) on a 5-point scale. However, many of the shortcomings of interpretation mentioned above can be remedied by a number of management actions targeted at the initial and continuous training of interpreters. This will be addressed in the Recommendations section.

#### **5.4 Evaluating the effectiveness of goal communication**

According to the definition applied in this study, evaluation is “the judgment or assessment of achievement against some predetermined criteria, usually a set of standards or objectives” (Hockings, Stolton & Dudley, 2000, p. 3). I evaluated the effectiveness of goal communication at each site against two predetermined criteria: 1) the stated goals of each site and whether interpreters are familiar with them and implement them; and 2) a number of elements of effective manager-interpreter goal communication that I have determined from scholarly literature and summarized in a checklist *Goal communication at a heritage site* (Appendix D).

1) Interviews revealed that interpreters are fairly well familiar with the goals of their heritage sites or at least with the goals they are personally trying to achieve. For example, historical interpretation and preservation of artifacts were mentioned by the majority of interpreters; community involvement and interactive programming were mentioned by interpreters whose responsibilities include development of new public programs. Such goals of heritage sites as building maintenance, artifact collection, and historical research were not mentioned by interpreters which can be explained by the fact

that interpreters are not personally responsible for and are not involved in these processes.

How goals are being implemented by interpreters was discussed in the previous section. The results of the discussion reveal that the main goal for which interpreters of heritage sites are responsible – site interpretation – is performed relatively well. However, goal implementation could have been more effective if interpreters had better training with an emphasis on how to present information to the public. In other words, it is important to communicate not only the goals, but also the most effective ways of implementing them.

2) Looking at the checklists, it can be said that managers use a variety of communication channels to communicate with their interpreters at work. Regular personal encounters, team meetings, newsletters, some elements of continuous training, performance evaluations, and active involvement of interpreters in program planning – are common examples of communication activities, and at least two out of three sites regularly perform each of these examples. The combinations of these communication practices may vary from site to site depending on the unique characteristics of each of them. Table 7 summarizes the communication activities used by each of the studied sites for better comparison.

We can see that some of the means of communication are more popular among management of heritage sites than the others. For example, email is never used at heritage sites simply because there is no need for it: everything that managers want interpreters to know may be announced through a bulletin board or personally in everyday interaction. The manager of Westfield could have used email to notify volunteer interpreters about

special occasions; however, the majority of interpreters are retirees who do not use the Internet and do not have email accounts.

Table 7: Means of goal communication used by different heritage sites: a comparison

| <b>Means of goal communication</b>    | <b>Doon Heritage Crossroads</b> | <b>Westfield Heritage Village</b> | <b>Dundurn Castle</b> |
|---------------------------------------|---------------------------------|-----------------------------------|-----------------------|
| Training/Orientation                  | √ <sup>14</sup>                 | √                                 | √                     |
| Demonstration tours                   |                                 | √                                 | √                     |
| Reading materials                     | √                               | √                                 | √                     |
| Continuous training                   |                                 | √                                 |                       |
| One-on-one meetings with manager      | √                               |                                   | √                     |
| Email communication                   |                                 |                                   |                       |
| Bulletin board/<br>mail boxes         | √                               | √                                 | √                     |
| Newsletter for interpreters           |                                 | √                                 | √                     |
| Regular team meetings                 | √                               |                                   | √                     |
| Feedback from managers                | √                               |                                   | √                     |
| Feedback from interpreters            | √                               |                                   | √                     |
| Performance evaluation                | √                               |                                   | √                     |
| Interpreters plan activities & events |                                 | √                                 | √                     |

More personal approaches to supervision of interpreters with regular team meetings and everyday encounters are used at Doon and Dundurn. Westfield, though, does not have such an opportunity because the site itself is bigger; it has more interpreters

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<sup>14</sup> Check mark means that scenario is implemented at the site.

working at the same time<sup>15</sup>; and the type of interpreters is different – they are volunteers, which make their supervision more complicated. In addition, only one or two coordinators are responsible for communication with interpreters and they do not have an opportunity to supervise everyone on a daily basis. The same reasons are used by the management of Westfield to explain the lack of interpreter performance evaluation. If this shortage of staff is to be maintained and if the present approach to goal communication at Westfield is to remain the same; more attempts could be made to at least provide interpreters with regular constructive feedback, if not regular evaluations. Other study sites seem to carry performance evaluations regularly and, according to the interview data, try to improve their methods so that interpreters do not feel intimidated by being judged.

In terms of goal communication, providing regular feedback about interpretation and implementation of other goals of a site can help managers to set the pace for ongoing improvements. In the Table 5.4 I identified that mutual feedback is being provided at Doon and Dundurn; however, this is not completely accurate. These sites do not have any special forms, meetings, or instructions to do so. Rather, an opportunity to provide regular feedback exists in the form of active day-to-day communication.

Interpreters of Westfield Village and Dundurn Castle participate in program planning and development. At Dundurn Castle all interpreters are involved in the planning because it is a part of their daily assignments together with the site interpretation. At Westfield, there is a certain group of people who is responsible for developing new programs; however, anyone who wishes to help can do it. Interpreters of

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<sup>15</sup> Comparing three sites: 3-8 interpreters work at the same time at Dundurn, 10-25 in Doon, and 30-40 (sometimes more) in Westfield.

Doon Heritage Crossroads do not participate in program planning since they are mostly seasonal employees; all the programs they perform were composed in advance and documented in an Educational Manual that each interpreter obtains at orientation. Program planning can also be an important element of goal communication strategy since it requires interpreters to work with site documents more closely and to incorporate site goals into actual events and activities.

Finally, continuous training can be considered one of the most important elements of successful goal communication strategy because it allows management to concentrate interpreters' attention on certain areas of their job (including site goals), refresh information provided earlier, extend interpreters' knowledge, and improve shortcomings of their performance. Despite all these potential advantages, continuous training is so far only offered at one of the three sites – Westfield Heritage Village.

Looking at the Table 5.4, at first glance it might be assumed that since the majority of its elements have been implemented, the manager-interpreter goal communication must be effective. However, as the interview data reveals, the actual goals of the sites are being communicated to interpreters only through orientation/training and reading materials. And even though both methods can be considered effective (especially if applied together), the main criticism here is that both methods are used at the beginning, when interpreters just start working at a site and when – with other information being communicated at the same time – goals can be overlooked by interpreters. Therefore, to ensure truly effective manager-interpreter goal communication, all methods included in the table should also be used for communicating goals to interpreters on a regular basis.

Finally, to better evaluate the effectiveness of goal communication at heritage sites, I asked my interviewees' opinion about it directly (Would you say you are effective in communicating the goals to interpreters?/Do you think your communication with the manager regarding site's goals is effective?). Two managers believe that their goal communication is not effective as goals of their sites are not strongly emphasized in the daily interaction with interpreters; and, according to the manager of Doon Heritage Crossroads, neither were goals emphasized during orientation: there was too much of other information to communicate to interpreters. The manager of the third site believes that she is doing her best in communicating everything possible to interpreters despite not having documented goals.

A positive attitude toward management and satisfaction with its everyday communication was expressed during each interview with interpreters, and from verbal and non-verbal cues I can say that this attitude was sincere. Interpreters of two sites talked enthusiastically about having very well-organized management structures headed by the right people. However, certain concerns about actual goal communication were expressed by interpreters at each of the sites. Among these concerns were the following: 1) managers do not emphasize goals strongly enough; and 2) even if managers make goals available, interpreters do not take time to learn them. Thus, goal communication is seen as a complicated process that requires participation from both parties, where managers stress the importance of the site goals and interpreters make a conscious effort to retain and apply such information.



In answering the research question, the obtained data indicates that the goals of the studied heritage sites are not being communicated from managers to interpreters as effectively as they could be. First, only two methods are used to communicate goals of the sites to interpreters. Second, interpreters do not receive enough initial and continuous training for the successful implementation of the site goals. And third, according to both managers and interpreters, goals are not emphasized enough in the day-to-day manager-interpreter communication.

Currently, none of the studied sites can be considered as a model of goal communication for other Ontario heritage sites. However, by combining the most effective techniques from all three sites into a set of recommendations for optimal goal communication, we can improve upon the shortcomings of each site and contribute to the existing best practices in this important area of heritage site management.

### **5.5 Developing recommendations for the most effective ways of goal communication**

Even though each site has to develop its own communication strategy depending on its specific goals, some universal recommendations for the improvement of goal communication practices can be given to the managers of heritage sites as an outcome of this research study.

1) Develop and document a set of goals that your heritage site is trying to achieve. If the goals already exist, verify them in accordance with the five main characteristics of a successful goal (specific, measurable, output-oriented, attainable, and timed).

2) Revise reading materials and hand-outs for interpreters to ensure that they include the goals of the site and that this information is strongly emphasized. It is even

more important to show the connections between the goals and the actual programming performed daily at the site. This kind of direct linkage would provide interpreters with the larger picture of what their daily work at the site is about.

3) In addition to including goal information in the reading packages, always search for other ways of conveying this information to interpreters. Regular communication activities such as everyday interaction, team meetings, special projects, and newsletters can be very effective for bonding everyday tasks to the goals of a site. Furthermore, creative ways of goal reminders are only encouraged (e.g., goals can be written on the wall in a changing room or in a common room).

4) Create more opportunities for interpreters to be involved in program planning and development. By being a part of a planning process and assisting in the incorporation of site goals into the actual activities and events, interpreters may come to an understanding of the goals more naturally.

5) To ensure successful implementation of the site goals by interpreters, provide opportunities for the skill development. Professional certification and training resources for heritage interpreters offered by Canadian Tourism Human Resource Council (CTHRC) can be the first step in this process. In addition, lectures or professional workshops on how to present site information in an interesting and exiting manner would be very useful for interpreters. Specifically for sites with all volunteer staff, Alderson and Low (1976) suggest to make beginner's training and continuous training mandatory for persons who wish to remain as interpreters:

Under these circumstances, interpreters feel fortunate to have been selected, grateful for what they have learned in their training, gratified to be doing something really important, and just a little apprehensive that, if they do not

appear when they are scheduled, someone else will be given their place (p.109).

6) Use performance evaluations to make necessary corrections soon after new interpreters start working with the public and school groups to ensure proper interpretation of the site. If performance evaluation is not conducted, provide constructive feedback to site interpreters on a regular basis.

7) Communicate with other heritage sites on an individual basis or within certain heritage associations to explore new management and interpretation practices. Encourage interpreters to visit neighboring heritage sites and participate in various heritage and interpreter associations (e.g., Interpretation Canada) as a part of continuous training.

8) Create a list of Best Practices for managers and employees at the site, reference it during orientations, team meetings and performance evaluations, and share it with other heritage sites.

## **5.6 Limitations of the research**

In attempting to generalize the results of this research to other heritage sites in Ontario or elsewhere, certain limitations should be considered. First, the fact that only three interpreters from each site were interviewed may affect the study's generalizability. And even if all interpreters were interviewed, the fact that just three sites were studied would make the results ungeneralizable in a field of more than a hundred of Ontario heritage sites.

Second, it should be considered that all sites of this study are relatively large (one is a National Historic Site), well-known in their communities, and located in highly

populated areas. The communication practices at the sites like these may differ from those at small heritage sites with fewer staff and less visitor traffic.

Third, on-site observations (other than those during special events) were conducted randomly when there was an opportunity to travel: sometimes on weekends and sometimes on work days. Therefore, there is a chance that I missed certain events and activities where interpreters might have performed differently and in a way that may have changed my overall impression of the site. However, given that I made three separate visits (excluding interview visits), it is doubtful that my impressions would have changed significantly.

Finally, even though anonymity of the responses was guaranteed, it is possible that some interpreters were hesitant to say negative things about their managers' practices during the interviews. Although I did not perceive such reluctance, the possibility should still be mentioned.

## **6. Conclusion**

This study aimed to establish the relationship between the goals of heritage sites as reflected in their official documents and the ways in which these goals are communicated and implemented on a daily basis at three heritage sites of Ontario. By applying three data gathering techniques – secondary data collection, interviews, and observations – and by analyzing the results this study revealed that the goals of the heritage sites are not being communicated from managers to interpreters as effectively as they could be. Specifically, 1) not all heritage sites have their goals documented; 2) only two methods – orientation/training and reading materials – are used by management to communicate goals of the sites to interpreters; 3) interpreters do not receive enough initial and continuous training for successful implementation of their sites' goals; and 4) goals are not enough emphasized in the day-to-day manager-interpreter communication.

A comparison of the strengths and weaknesses of each site led to the development of several recommendations for improving goal communication at all heritage sites similar in size and organization to the three under analysis. Further research that employs data gathering techniques not used here such as ethnographic study, and interviews with visitors and other members of staff, may enhance the reliability of my findings and add greater substance to my recommendations.

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## Appendix A: sample of an email to the manager of a heritage site



Date

Dear ...:

This letter is an invitation to consider participating in a study I am conducting as part of my Master's degree in the Department of Recreation and Leisure Studies at the University of Waterloo under the supervision of Professor Robert Shipley. I would like to provide you with more information about this project and what your involvement would entail if you decide to take part.

I would like to conduct the research at three Ontario heritage sites: Westfield Heritage Village (Rockton), Doon Heritage Crossroads (Kitchener), and Dundurn Castle (Hamilton). The study aims to evaluate the effectiveness of goal communication at Ontario heritage sites. Ultimately, the purpose of this investigation is to develop recommendations for the most effective goal communication at heritage sites with the help of information gathered through site visits, document analysis, and interviews.

The study may be beneficial for the participating heritage sites as it is conducted by an independent researcher who aims to analyze the effectiveness of on-site manager-employee communication regarding site's goals. The results of the research and recommendations will, upon request, be shared with the participating sites.

As a manager of ..... [name of the site], you can contribute to this research in the following ways:

1) provide me with your site's managerial documents such as mission statement, management plan, annual reports, or any other documents that contain your site's goals.

2) participate in an interview of approximately 40-50 minutes in length that will contain general questions (e.g., What does your day-to-day communication with employees look like?) and that will take place at a mutually agreed upon location. This interview is needed to gather a general understanding of communication with employees regarding goals communication.

3) give permission to interview three of your interpreters. I will follow your directions about the time and place to conduct these interviews; each of them will take 30 to 45 minutes.

Your participation in this project is voluntary. You may decline to answer any of the interview questions if you so wish. Further, you may decide to withdraw from this

study at any time without any negative consequences by advising the researcher. With your permission, the interview will be audio recorded to facilitate collection of information, and later transcribed for analysis. All information you provide is considered completely confidential. Your name will not appear in any thesis or report resulting from this study. However, with your permission, anonymous quotations may be used.

Your participation in this study will be greatly appreciated. Please contact me at 519-725-7321 or by email at irazinko@uwaterloo.ca. You can also contact my supervisor, Professor Robert Shipley at 519-888-4567 ext. 35615 or email: rshipley@fes.uwaterloo.ca

I very much look forward to speaking with you and thank you in advance for your assistance in this project.

Yours Sincerely,

Irina Razinkova

## **Appendix B: Interview questions (managers)**

1. How do you communicate the goals of the village to your interpreters? (e.g., training, orientation, reading materials, goals written on the wall)
2. What does your day-to-day communication with interpreters look like? (e.g., team meetings, training, feedback, emails)
3. Would you say you are effective in communicating the goals of the site to your interpreters?
4. What do your interpreters usually do when there are no visitors in the village?
5. How do you monitor and measure the interpreters' performance with respect to goals implementation?
6. How do interpreters implement the site's goals?

### **Appendix C: Interview questions (interpreters)**

1. What are the goals of your heritage village, and how have you learned about them? (e.g., training, orientation, reading materials, goals written on the wall).
2. What does your day-to-day communication with the manager look like? (e.g., team meetings, training, feedback, emails).
3. Do you think your communication with the manager regarding site's goals is effective, and why?
4. What do you usually do when there are no visitors in the village?
5. What do you do to implement the goals of the village?
6. How is the performance of your work being monitored and measured?



**Appendix D: Checklist: Goal communication at a heritage site**

| <b>Elements of communication strategy</b>                         | <b>YES</b> | <b>NO</b> | <b>Details</b> |
|---|------------|-----------|----------------|
| Formal training/orientation provided                              |            |           |                |
| Demonstration tours are part of training                          |            |           |                |
| Reading materials provided  |            |           |                |
| Continuous training provided                                      |            |           |                |
| One-on-one meetings with the manager are common                   |            |           |                |
| Active e-mail communication                                       |            |           |                |
| Bulletin board/ mail boxes exist(s)                               |            |           |                |
| News-letter exists  |            |           |                |
| Team meetings held on a regular basis (weekly/biweekly/monthly)   |            |           |                |
| Managers provide feedback on a regular basis (daily/weekly)       |            |           |                |
| Interpreters provide feedback on a regular basis (daily/weekly)   |            |           |                |
| Interpreters are aware of the goals of the site                   |            |           |                |
| Performance evaluation is regularly conducted (seasonally/ early) |            |           |                |
| Interpreters participate in planning of activities & events       |            |           |                |

**Appendix E: Checklist: Interpretation at a heritage site**

Interpreters provide analogies with day-to-day life of visitors

|   |
|---|
| always – most of the time – sometimes – never |
|---|

Interpreters engage visitors in their interpretation

|   |
|---|
| always – most of the time – sometimes – never |
|---|

Interpreters ask questions

|   |
|---|
| always – most of the time – sometimes – never |
|---|

Interpreters recognize the needs of different age groups and adjust interpretation accordingly

|   |
|---|
| always – most of the time – sometimes – never |
|---|

Interpreters use time appropriate tools and dress up accordingly

|   |
|---|
| always – most of the time – sometimes – never |
|---|

Interpreters are available at the site

|   |
|---|
| always – most of the time – sometimes – never |
|---|

Amount of information provided

|                               |
|-------------------------------|
| 5      4      3      2      1 |
|-------------------------------|

Overall perception of the site

|                               |
|-------------------------------|
| 5      4      3      2      1 |
|-------------------------------|