

The University of Calgary

**ISSUES IN OPEN-AIR MUSEUM MANAGEMENT:  
PLANNING, MARKETING AND INTERPRETATION**

By

Marnie J. Skobalski

A Master's Degree Project  
submitted to The Faculty of Environmental Design  
in partial fulfilment of the requirements for the degree of  
Master of Environmental Design  
Urban and Regional Planning

Calgary, Alberta  
January, 1992

THE UNIVERSITY OF CALGARY  
THE FACULTY OF ENVIRONMENTAL DESIGN

The undersigned certify that they have read and recommend to the Faculty of Environmental Design for acceptance, a Master's Degree Project entitled:

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# **ABSTRACT**

## **ISSUES IN OPEN-AIR MUSEUM MANAGEMENT: PLANNING, MARKETING AND INTERPRETATION**

Marnie J. Skobalski  
January, 1992

Prepared in partial fulfilment of the requirements of the  
Master of Environmental Design degree in the  
Faculty of Environmental Design,  
The University of Calgary

Supervisor: Walter Jamieson

This Master's Degree Project discusses three key issues in open-air museum management: planning, marketing and interpretation. The role of the museum in society is introduced along with clarification of the roles of management and the board of directors of the museum organization. The relationship between first level strategic planning and second level, or operational planning, is described with Historic O'Keefe Ranch serving as an example throughout the document. An approach to strategic planning for a non-profit open-air museum is put forth and includes, for illustrative purposes, the identification of two strategic issues: marketing and interpretation. A marketing planning process is outlined and includes discussion of the open-air museum's "product." An introduction to open-air museum interpretation is provided along with an approach to planning an interpretive program. An evaluation of the Historic O'Keefe Ranch interpretive program is included with recommendations for an improved interpretive offering.

Key Words: open-air museum, strategic planning, marketing, interpretation

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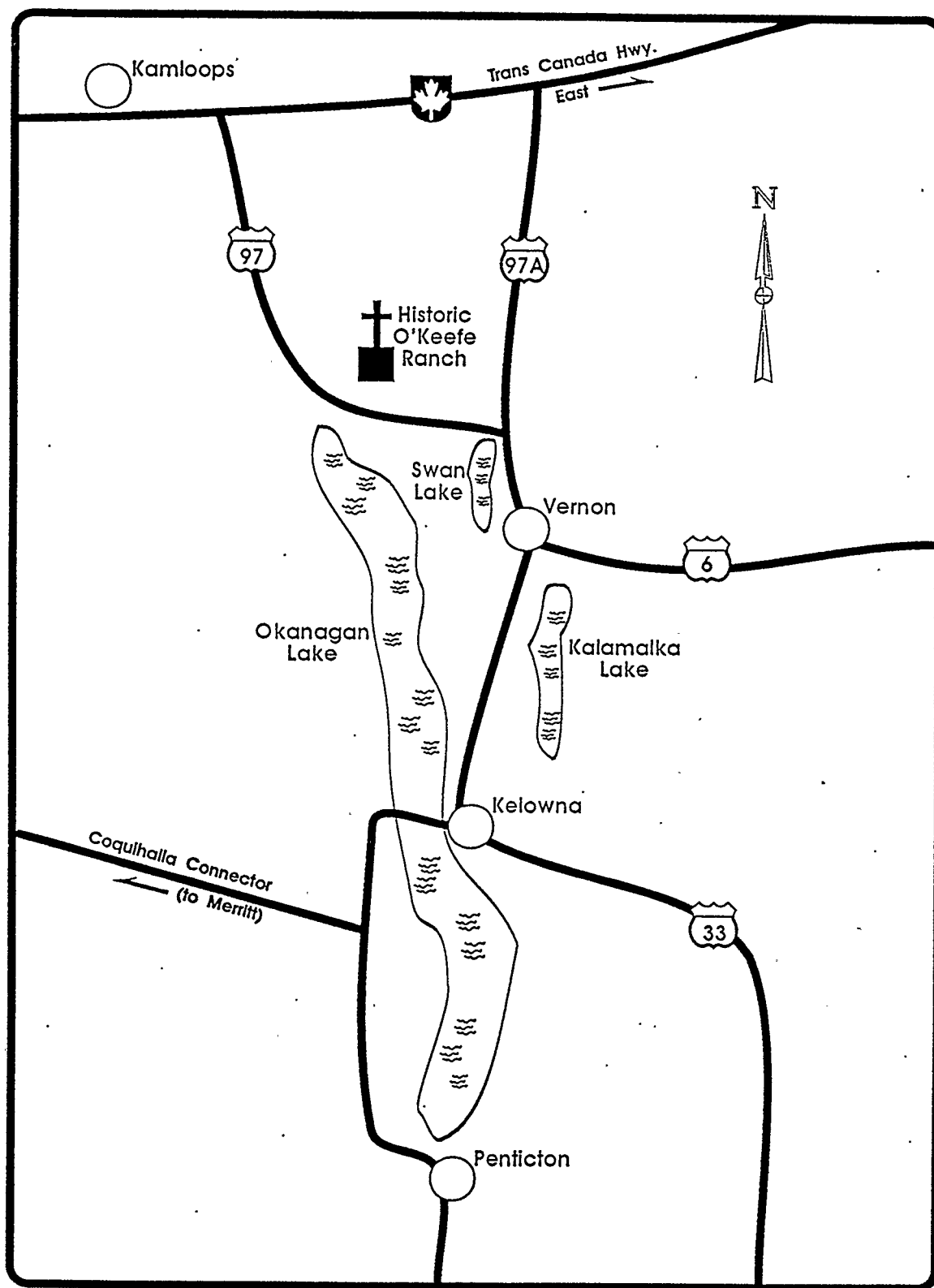
## INTRODUCTION

This Master's Degree Project was produced as partial fulfilment of the degree of Master of Environmental Design for the Faculty of Environmental Design at The University of Calgary.

The objectives of this study are:

1. To provide explanation of the vital role which planning plays in open-air museum management.
2. To distinguish between two levels of organizational planning: - strategic planning (or "first level") which is intended to determine overall organizational objectives and provide the basis for all other management decisions, and planning which originates out of the strategic planning context and is more operational in nature ("second level"), related to the various functions within an open-air museum.<sup>1</sup>
3. To outline an approach to first level strategic planning using Historic O'Keefe Ranch as an example.
4. To utilize marketing and interpretation (two important issues which may emerge from a strategic planning process undertaken for an open-air museum) for an explanation of second level planning using Historic O'Keefe Ranch as an example.

FIGURE 1. REGIONAL MAP





One particular open-air museum has been selected to serve as an illustrative example throughout this document. The use of Historic O'Keefe Ranch as an example in the discussions of strategic planning, marketing and interpretation should help to clarify key concepts and principles. This approach is intended to enable the reader to better visualize the application of planning principles to the management of an actual open-air museum. At the end of the Introduction a description of Historic O'Keefe Ranch summarizes the history of the site from its inception in 1867 to its present day status as an open-air museum.

Chapter One provides an introduction to strategic planning and to the roles of both the board of directors and management of a non-profit organization such as an open-air museum. It is important that the distinctions between these two administrative levels are clarified up front so as to avoid any ambiguity when referred to later in the document.

Strategic planning is viewed as a vital part of open-air museum management for a number of reasons:

Strategic planning necessitates the review or establishment of an organizational statement of purpose or "mission statement." Open-air museum administrators must have a clear understanding of the organization's purpose and objectives before developing new or enhancing existing programs.

Strategic planning emphasizes proactive rather than reactive management. The strategic museum administration makes an effort to anticipate the effects of both internal and external conditions.

Non-profit organizations, such as museums, operate in an unpredictable environment. Strategic planning, with its consideration of varied scenarios and alternative actions, equips the organization to deal with changeable conditions.

Strategic planning is enriched by input from personnel at all levels of the organization.<sup>2</sup> A spirit of teamwork and cooperation can be fostered when feedback from staff is seriously considered.

Strategic or "first level" planning provides administrators with an opportunity to review the general direction in which the organization is headed. Establishing or reviewing the organizational mission and mandates helps to ensure that all departments and personnel are working towards the same ends. A thorough evaluation of the site's heritage, financial and human resources together with an examination of external factors such as market trends, competitors and collaborators, can provide the background information essential to effective second level planning. Without the willingness and ability to operate in a businesslike manner, an open-air museum cannot expect to remain a successful, viable operation amid the increasingly competitive "heritage industry."

Chapter Two deals with the issue of marketing. Many open-air museums have a difficult time obtaining sufficient funds to carry on their activities. The struggle to gain sound financial footing may go on year after year. Museum administrators have easily adopted such business functions as planning, financial administration, personnel management and public relations but despite persistent financial problems many museum administrators view marketing with suspicion.<sup>3</sup> Marketing can, however, enable the open-air museum to approach their overall objectives. By identifying and targetting market segments, providing a high quality, memorable experience and by cultivating a strong, positive public image, the open-air museum can become less dependent on public sector support and achieve the financial security necessary to meet the expectations of future generations.

Many open-air museums are operated on a seasonal basis and often experience considerable fluctuations in visitor numbers. Visitation levels often peak during July and August but may be significantly lower in the months preceding and following this period, often referred

to as the "shoulder seasons." A strategic approach to marketing can help to minimize the severity of seasonal peaks and valleys.

Marketing is not a haphazard activity and should be approached as a carefully thought-out process. Through research, the open-air museum's administrators can identify visitor groups or "market segments" which would be likely to have an interest in visiting the site. As part of the marketing plan, the quality and scope of the museum's products and services must be evaluated. Such an evaluation may reveal certain inadequacies (as in interpretation or personnel for example) which should be resolved before embarking upon a vigorous advertising or promotional campaign. While marketing can help the museum organization to increase revenue;

they must at the same time remember to respect their inherent heritage characteristics and qualities and never compromise these to such an extent that the project loses its unique flavour or special ethos, which in the long run will always remain the foundation of any of the project's future 'commercial' success.<sup>4</sup>

The need to evaluate and possibly upgrade an open-air museum's interpretive program is another issue which could emerge from a strategic planning study. Once visitors have been attracted to an open-air museum they will want to experience value for their dollar. The interpretive program constitutes a large part of the overall experience or "product" offered by an open-air museum. Successful product development will be oriented towards the visitor while bearing in mind the preservation requirements of the heritage resource. An awareness of the products, services and leisure experiences offered by the open-air museum's competitors is an important consideration in product development. By researching their markets and developing a captivating, quality experience, an open-air museum can begin to forge a competitive edge. Given the unique nature of an open-air museum's heritage resources, this should not be an inordinately difficult task.

Chapter Three includes a description of an interpretation planning process. While there are a wide variety of actions which may be implemented to improve a site's interpretive program, the expenses associated with many may be more than the open-air museum's budget will allow. The interpretive planner will necessarily evaluate a number of alternatives to determine which can realistically be implemented within the site's financial means. Interpretive planning which strives to offer a positive, memorable visitor experience works hand-in-hand with marketing which can help to provide the means to attain this objective. Using Historic O'Keefe Ranch as an example, present methods of interpretation are assessed and recommendations for an improved interpretive program are put forth.

It may be helpful at this point to provide a definition for some of the terms referred to in this document.

**Museum:**

A museum is a non-profit permanent establishment, not existing primarily for the purpose of conducting temporary exhibitions, exempt from Federal and Provincial income taxes, open to the public and administered in the public interest, for the purpose of conserving and preserving, studying, interpreting, assembling and exhibiting to the public for its instruction and enjoyment, objects and specimens of educational and cultural value, including artistic, scientific (whether animate or inanimate), historical, and technological material. Museums thus shall include art galleries, art exhibit centres, botanical gardens, zoological parks, aquaria, planetaria, historical society museums and historical houses, preservation projects, and sites which meet the requirements set forth in the preceding sentence.<sup>5</sup>

**Historic Site:**

Any site which includes or is comprised of an historic resource of an immovable nature or which cannot be disassociated from its context without destroying some or all of its value as an historic resource and includes a prehistoric, historic or natural site or structure.<sup>6</sup>

### Open-air Museum:

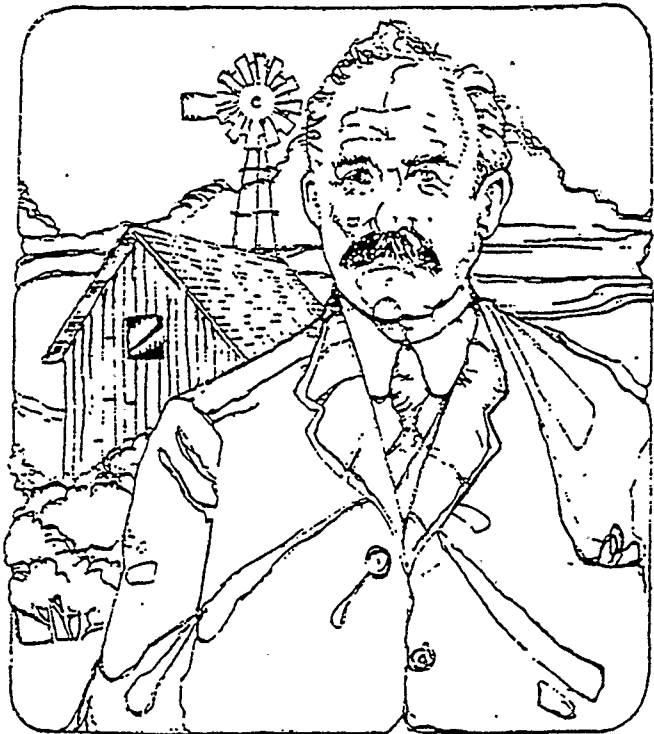
An open-air museum is a type of museum which may or may not also be an historic site. Unlike a traditional museum which houses its collection in a single building, the open-air museum encompasses artifacts, built structures and the landscape of the site itself. Open-air museums may include original buildings on their original locations, original buildings moved to the site and/or reconstructed buildings.

This document may be of interest to those involved in open-air museum administration either as a member of the board of directors or in a management position. It may also be of interest to those involved in site interpretation either on the "frontline" as an interpreter or behind the scenes as a program developer.

It is hoped that this document may shed some light on three basic components of open-air museum management: planning, marketing and interpretation.

### O'Keefe Ranch - Past, Present and Into the Future

Historic O'Keefe Ranch is located on Highway 97, 12 km north of Vernon, B.C. (FIGURE 1). The Ranch currently encompasses about 25 hectares and is located in the valley bottom at the north end of Okanagan Lake. Stands of Ponderosa Pine and Interior Douglas Fir intermingle with the rolling agricultural land which surrounds the Ranch.

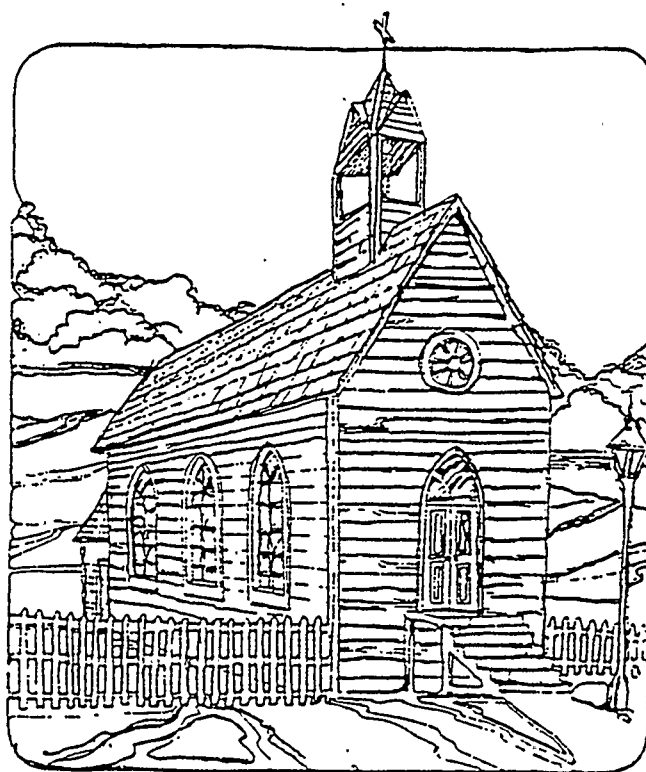


In 1837, Cornelius O'Keefe was born near Ottawa and as a young man he travelled west to try his luck in the frenzied search for gold. He arrived in the Cariboo around 1862 and fully expected to make his fortune. He soon realized however, that better money could be made in supplying the miners with beef. Cornelius O'Keefe became a partner with Thomas Greenhow and together they began driving cattle from Oregon to the B.C. interior. On one such drive they camped in the meadowland at the north end of Okanagan Lake (near the present site of O'Keefe Ranch) in order to rest the cattle and fatten them on the lush bunch grass once so abundant in the area. O'Keefe and Greenhow agreed that it made sense to raise cattle in the North Okanagan area rather than to herd them all the way from Oregon.

Cornelius O'Keefe and Thomas Greenhow each pre-empted 160 acres from the Colonial Government of British Columbia in 1868. In the years that followed both men accumulated substantial acreages while land prices were low. O'Keefe and Greenhow owned their ranching operations separately though they worked closely together.

In 1877, Cornelius O'Keefe married Mary Ann McKenna and built a two storey log house which remains on the site. Together they had nine children. In 1886 the large O'Keefe house was built to accommodate the growing family. Thomas Greenhow married Elizabeth Coughlan and the two families lived next door to one another. Thomas Greenhow died in 1889 while plans for their own large ranch house were being drawn up. His widow Elizabeth decided to go ahead with the construction after Thomas' death and capably took over his ranching operation. The O'Keefes greatly expanded their house in 1896 and the two beautiful mansions stood side by side until 1939 when, sadly, the Greenhow house burned to the ground.

Cornelius O'Keefe donated land and \$100 towards the construction of St. Ann's church in 1888. Other settlers in the area also contributed money and a copy of the original list of donors remains on display. The church was built by a local contractor in the Carpenter Gothic style and remains virtually unaltered. Mary Ann O'Keefe died in 1899 and is buried in the cemetery of St. Ann's church.



Just one year after Mary Ann's death, 63 year old Cornelius married 23 year old Elizabeth Tierney. Elizabeth bore six children, the youngest of which was conceived when Cornelius was 72 years old.

Aside from cattle and grain production, O'Keefe Ranch provided services to the surrounding area. A sawmill, grist mill, blacksmith, post office and general store operated at the Ranch which also served as a stopping place for the Barnard Express (BX) stage coach.

The railroad reached Vernon in 1885 and with it arrived real estate developers who wanted to purchase large amounts of land for resale to settlers moving into the area. Ranchers were offered attractive prices and many sold all or part of their land. In 1907, Cornelius O'Keefe and Elizabeth Greenhow sold a combined total of 14,606 acres to the Belgian owned Land and Agricultural Company of Canada.

Cornelius died at home in 1919 at the age of 82. His widow, Elizabeth, took over the ranching operation until her death in 1929. The O'Keefe's youngest son, Tierney, assumed control of the ranch until 1977.

In recognition of Canada's centennial and the Ranch's 100th birthday, Tierney and his wife Betty decided to preserve the Ranch as an historic site and opened it up to visitors in 1967. Many original artifacts from the post office and general store were removed from storage and put on display in a turn-of-the-century style General Store built for this purpose. The blacksmith shop was reconstructed next to the General Store and a boardwalk was built which linked the original 1877 O'Keefe log house, with the General Store, blacksmith shop and St. Ann's church.

In 1977, the Ranch was purchased by the Devonian Group of Charitable Foundations of Calgary and donated to the City of Vernon with the understanding that a non-profit society be established to preserve and oversee the operation of the Ranch as an historic site in perpetuity. The O'Keefe Ranch and Interior Heritage Society was established with a mandate to preserve and interpret not only the Ranch, but the history of the North Okanagan.

Presently at the Ranch, there are about ten heritage structures and a few more contemporary buildings housing a variety of displays along with a gift shop and restaurant. It is believed the O'Keefe Ranch is the only one in B.C. which was lived in continuously by the same family for 110 years (1867-1977).<sup>7</sup>

In 1989, the O'Keefe Ranch and Interior Heritage Society accepted the donation of the pioneer home of Augustus Schubert Jr. Together with his parents Augustus and Catherine, brother James and sister Mary Jane, six year old Augustus Jr. embarked on the extraordinary Overlanders' journey of 1862. The Schuberts decided to settle in the North Okanagan area and



in the late 1880s, Augustus Jr. and his wife acquired land a few miles northeast of the O'Keefe Ranch. In 1891, Augustus Jr. built a stately Victorian home on this property where he resided until his death in 1946 at the age of 91. The property remains in the ownership of the senior Schubert's great-great-granddaughter. The house, on its original location, was not being utilized and would have been torn down if it could not be moved elsewhere. Now located at the O'Keefe Ranch it is sufficiently removed from the O'Keefe buildings in order to retain its own unique identity. The Schubert house will provide the opportunity to relate the story of this notable pioneer family and to interpret the role of the Overlanders' who endured 1,500 miles of hardships and peril to reach the B.C. interior.

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## **CHAPTER ONE**

### **STRATEGIC PLANNING IN OPEN-AIR MUSEUM MANAGEMENT**

Open-air museum management in the 1990s is a challenging, often rewarding experience and is proving to be anything but monotonous. Most museum administrators are faced with a wide range of obligations, opportunities and constraints. Those responsible for administering open-air museums are faced with decisions regarding financial administration, conservation, education, interpretation, personnel management, marketing and public relations. The ability to balance the needs of the organization's internal operations with those of its external publics is the key to the museum's survival. It is no easy task to;

maintain standards of excellence in collection and preservation, while...(ensuring) that cultural resources are available for the use and enjoyment of the public in keeping with their needs and demands.<sup>1</sup>

Many people would agree that history museums, both traditional and open-air, play a valuable role in our society. The museum's resources, both natural and man-made, provide us with a tangible link to our past and represent aspects of our technological, cultural and social history. Three important functions of museums are:

1. Collection - the acquisition of artifacts, photographs and other materials relevant to the museum's purpose.
2. Preservation - maintenance of the artifact in the same physical condition as it was when received by the museum; repairs necessary to prevent further decay are permitted, however, any such interventions should be visually unobtrusive.
3. Interpretation - 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.<sup>2</sup>

Through the museum's process of collection, preservation and interpretation we are able to better understand the past. By understanding the past we can gain insight into the problems and achievements of the present and, hence, be better prepared to cope with the future.

The problems of today and tomorrow, after all, were created yesterday. It is not always necessary to know how a problem was created, in order to solve it, but it is usually very helpful.<sup>3</sup>

If an institution is of little importance, then it does not matter to any great degree whether it is good, bad or insipid. If, however, the existence of an institution is recognized to be of value to the members of a society then its quality is a matter pertinent to all citizens. Therefore, if it is agreed that museums are of value, we must never be content with mediocre museums.

With this understanding of the role of history museums, it becomes apparent that museums must strive to attain and maintain a standard of excellence in order to survive and serve the needs of the next generation.

## 1.1 THE ROLES OF THE BOARD AND MANAGEMENT

If the administrators of open-air museums are to effectively handle the variety of issues which face them day-to-day, there must be no confusion about the organization's "chain of command." While most lower status employees such as receptionists and maintenance workers are usually provided with precise job descriptions, the roles of management and the board of directors may not be so clearly defined. Without a structure which is understood and accepted by all museum personnel, working relationships will become abraded, budgets may be overrun and eventually the organization will break down.<sup>4</sup> When museum personnel at all levels understand their roles within the organization, they can work together to achieve organizational

objectives. It is particularly important that the board of directors and management understand their respective roles in order to formulate objectives and effectively plan for the organization.

### **The Board of Directors.**

It is the board's responsibility to govern: "to monitor quality and to see to it that the organization fulfils its mission."<sup>5</sup> The board should be concerned with policy, strategy, direction and purpose. One of the functions of the board is to assess and periodically reassess the purpose and function of the organization.

The board should evaluate the museum's physical facilities, staff, programs and budget in context of the organizational purpose and desired future directions. The board must be concerned with adherence to the budget and ensure that the implementation of policy remains within the constraints of available resources.

Every board member should be aware of the wording of the organization's constitution before accepting a position on the board. The board must provide management with a clear statement of the organization's underlying purpose. This document serves as a fundamental guide to the manager. Without it the manager will pursue what he/she believes is important to the organization until eventually the board and manager meet at an impasse over the direction the museum is headed. The board may feel the manager is assuming unauthorized control while the manager feels the board does not support his/her efforts.

The board is responsible for hiring and supervising the manager but should not be involved in day-to-day operational matters. Meddling in the responsibilities of the manager and staff will cause even the most competent employees to feel undermined. If the interference continues, staff members so affected may leave the organization.

The board should be accountable to the public. The board is a public link between the organization and the community:

The trustees represent not only the organization to the public but also the public to which the organization's efforts are directed.<sup>6</sup>

Through the media the board can inform the public of any major decisions or significant developments within the organization. It is often easier to let the manager speak for the organization as he/she often knows more about the programs of the museum than most directors. However, the manager is only indirectly responsible to the public. The board is responsible to the public and the manager is responsible to the board. Board members should always be prepared to speak for the organization and therefore should be intimately familiar with the organization's operations, programs, current issues etc.

The care of collections is also part of public accountability. Buildings and/or objects of value have been entrusted to the museum in order to be preserved for present and future generations. The public must be assured that the museum's collection, the historic site's natural and built environment is secure and adequately preserved. The board is responsible to ensure that provision of security for the buildings and collection is reflected in the organization's budget.

The board can demonstrate public accountability through the provision of services. Exhibitions and displays are the obvious type of museum services but many others are important as well:

Interpretation, accuracy of information, pleasant surroundings, services, hospitality, safe and comfortable viewing or involvement, and solicitation of opinion are other areas in which the board must attempt through its institution to provide the public with services.<sup>7</sup>

The board is responsible for the organization's finances and must ensure that sufficient funds are available to meet the open-air museum's operating costs, staff wages and benefits,

buildings and grounds maintenance, security, curatorial needs and all the other services noted above.

Boards benefit from feedback on their performance. For example, members themselves could provide feedback at the end of each meeting and/or once a year at a meeting devoted to assessing board performance. There should be means by which management can express feedback as well.

### **Management.**

The manager of an open-air museum is the most visible connection between the board, staff and visitors and is often counted on to work in many capacities; as curator, administrator, fund raiser, historian, master of public relations and government liaison. K. Ross Toole referred to the manager as "the sandwich man" because of his position of being pressed from the bottom by staff and from the top by the board.<sup>8</sup> An open, honest relationship between the board and management is essential for smooth operation of the museum.

Management should be able to recognize, assess and anticipate issues which will impact on the museum and recommend courses of action to the board. The board must be provided with up-to-date information on financial and program matters in order to make well-informed decisions. Management should work with the board to formulate policy objectives. Once objectives are defined, management can draft the policy. As policies are drafted they should be submitted to the board for review and approval.

Implementation of policy within budgetary limits is the responsibility of management.

As a rule, the board should be involved in policy execution only as a facilitator, and individual trustees should participate very selectively.<sup>9</sup>

The consequences of policy decisions should be evaluated. Periodically, management should brief the board on both the intended and unintended effects of important policies. Management should formulate and carry out the evaluation, assess the results and recommend any policy adjustments.

The administrators (board and management) of open-air museums should cultivate a working environment wherein employees have the opportunity to provide feedback to management. Employees who feel they have a voice in the organization are likely to experience greater job satisfaction because they perceive that their contribution is recognized and valued by others. Fostering an atmosphere where both management and employees take pride in their responsibilities is important when one considers the unique and irreplaceable nature of the resources placed in their care.

Planning is a responsibility which is, to some degree, shared by both the board and management. Each will be called upon to fulfil particular roles at various stages of the process. It is, therefore, important for each to understand their roles and responsibilities before attempting to formulate a plan for the organization.

## **1.2 THE STRATEGIC PLANNING PROCESS**

Planning is a vital function for any museum organization intending to offer a high quality experience to its visitors. "Quality" may be thought of in terms of the museum's standards of curatorial care, the nature of exhibit presentation, level of interpretation, accuracy and appropriateness of information, customer care, support services, maintenance and administration.



Approaches to the planning of non-profit organizations have evolved along with other management techniques. The rational/comprehensive approach to planning was, until recently, widely accepted by planners and organizational administrators. This process, wherein data collection is performed, alternative means are assessed and a preferred strategy is selected to ultimately achieve predetermined objectives has become outmoded as it is now recognized that it presupposes several conditions which seldom exist: plenty of time and money to complete a plan; a strong measure of centralized control; a stable, predictable environment; complete agreement on objectives and a knowledge of all alternatives and their consequences.<sup>10</sup> Planning was considered to be separate from implementation.

The making of *plans* was a "batch" process akin to completing the manufacture of one product at a time. *Planning*, on the other hand, could be compared to an assembly line operation that is continuous.<sup>11</sup> (italics added)

Planning should not be a periodic activity but should be incorporated into the organization's administrative activities as an accepted and ongoing process.

Planning for an open-air museum can be conceptualized at two levels.<sup>12</sup> Planning at the first level is concerned with determining, or possibly reconsidering, overall organizational objectives, charting direction for the long term (three years or more) and identifying strategic issues.

Second level planning involves developing and implementing shorter term action plans intended to resolve the strategic issues identified through the (first level) strategic planning process. Planning at the second level is more operational in nature and in scale. At any given time an open-air museum may be involved in the development and implementation of plans related to specific issues and programs such as visitor services, interpretation, preservation, marketing, maintenance, security and so on. Short term plans, ranging from a few weeks to

around two years duration, are intended to move the organization from its present position towards the objectives envisaged in the overall strategic plan. To better understand the relationship between first and second level planning, strategies and action plans see FIGURE 1-1 and FIGURE 1-2.

FIGURE 1-1. THE STRATEGIC PLANNING PROCESS

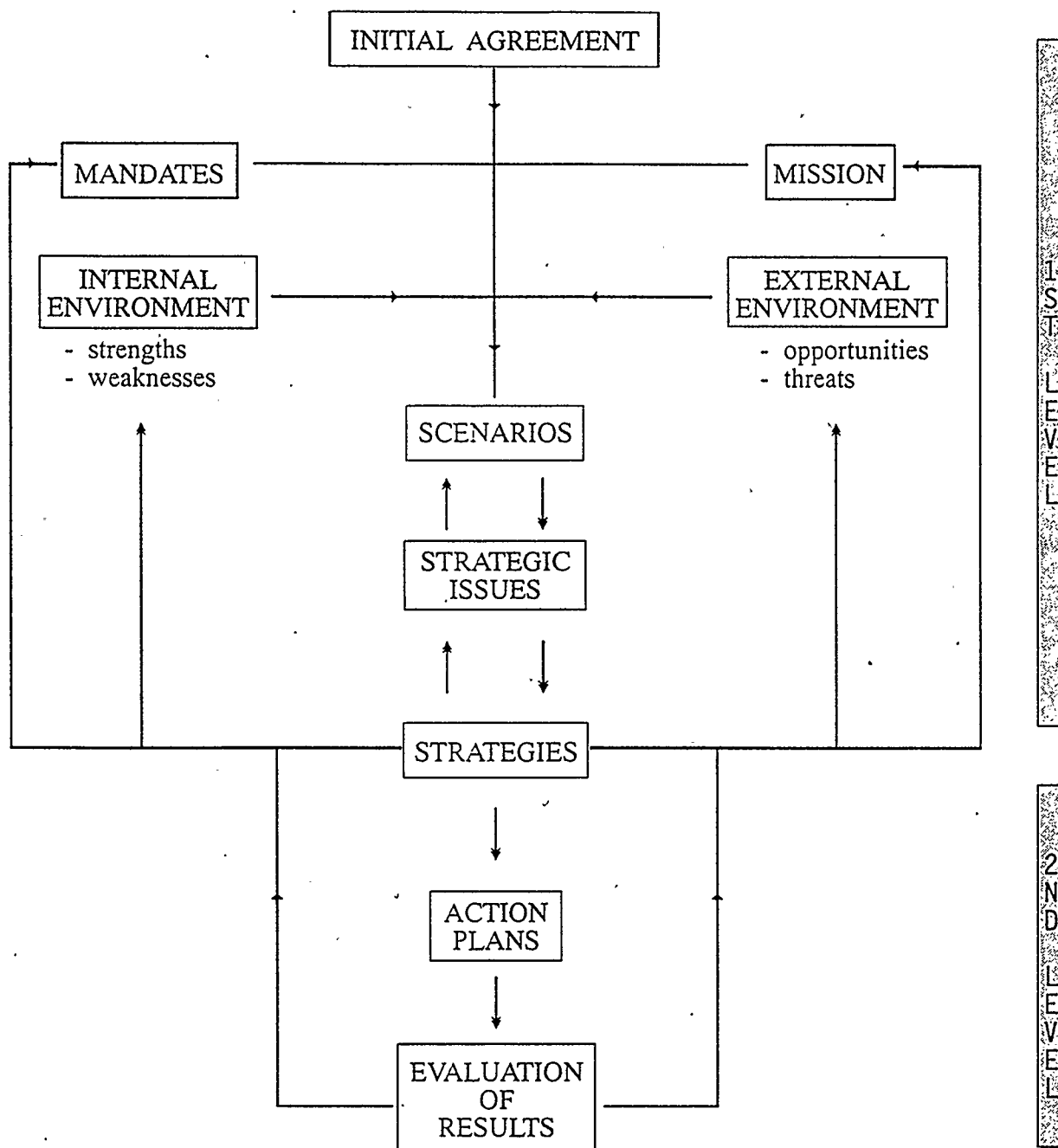
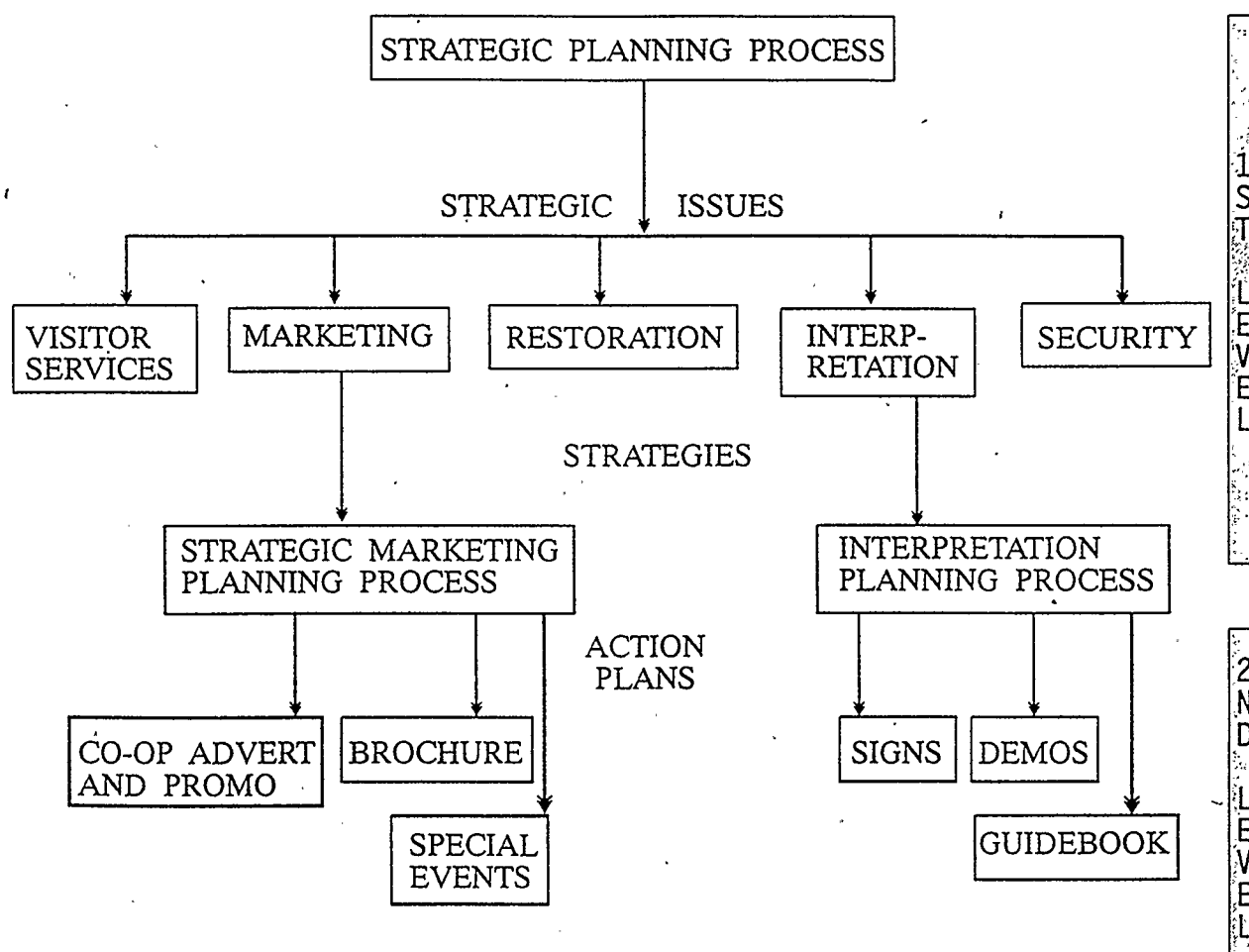


FIGURE 1-2. STRATEGIC ISSUES, STRATEGIES AND ACTION PLANS



There is no single, universally accepted process or model of strategic planning though it is generally agreed that strategic planning is not a strictly linear process. It is also generally agreed that a "corporate entity" serves as the focus of the strategic planning effort. The corporate entity may take the form of a community, a business or a non-profit organization.

Strategic planning:

is done for purposes of corporate change and capacity-enhancement, for shaping, directing, focusing, programming and coordinating the efforts of the corporation in the pursuit of its mission.<sup>13</sup>

The administration of the Ranch is handled by the board of directors of the O'Keefe Ranch and Interior Heritage Society who develop policy and determine direction, and by a manager whose job it is to implement these policies.

Since assuming responsibility for Historic O'Keefe Ranch in 1977, the administration has endeavoured to provide visitors with a quality experience while maintaining high standards of curatorial care. A strategic planning process would be an opportunity for the administrators to evaluate the Ranch's present state of affairs and to consider a broad range of factors which will influence future decision-making. By identifying key issues facing the organization, Ranch administrators can begin to develop and implement strategies which will help to attain organizational objectives and serve the needs of its publics efficiently, effectively and responsibly.

Should the directors of Historic O'Keefe Ranch decide it would be to their benefit to undertake a strategic planning effort, they could follow the process outlined below. These seven steps are intended to serve as a guideline. With careful consideration and an understanding of

the fundamentals and intent of strategic planning, the process can be adapted by the planning team members to suit their particular situation.

The following steps are based upon those developed by John M. Bryson.<sup>14</sup>

### **1. Establish Agreement Regarding Strategic Planning Commitment.**

Initially, the administrators of Historic O'Keefe Ranch need to agree upon and concisely define the purpose of the strategic planning effort. For example, the statement of purpose could be phrased in relatively non-specific terms such as:

The strategic plan undertaken by the O'Keefe Ranch and Interior Heritage Society planning team is intended to identify and prioritize important issues facing the Ranch and to develop and implement strategies, compatible with the Objects of the Society, to address these issues. These issues and actions will provide the basis and direction for site and program development over the next three to five years.

At this first stage it is important to define the reason for the planning initiative; the steps to be followed in the process; the purpose, membership and functions of the strategic planning team and to have assurance that sufficient resources are available to undertake the effort.

### **2. Identify and Clarify Mandates.**

In order for the open-air museum to meet its obligations and to know what pursuits are and are not permissible it is necessary to have a clear understanding of the mandates imposed on the organization. These mandates are usually contained in the articles of incorporation, charters, regulations and/or legislation of non-profit and public organizations.

### 3. Identify and Clarify Mission.

The mission statement of an open-air museum will originate out of the needs within the organization and within the community of which it is a part. The purpose of the mission statement is to ensure that everyone within the organization is working in the same direction, towards the same ends. The mission statement should be brief and to the point. Together with the organization's mandates, the mission provides "the social justification for (the organization's) existence."<sup>15</sup>

The objectives of the O'Keefe Ranch and Interior Heritage Society were recorded in its Constitution, dated March 7, 1977, (tantamount to its "mission statement") and are as follows:

"The objects of the Society shall be restricted to those which are charitable in nature and for the education and recreation of the public, the specific objects of the Society being:

- a) To advance the knowledge and appreciation of, and stimulate interest in, the historical and cultural background of Western Canada and in particular, the way of life in the North Okanagan area.
- b) To provide and operate facilities for the preservation, maintenance, display and development of matters of historical or cultural significance in Western Canada and in particular in the North Okanagan area.
- c) To provide instruction to persons wishing to study matters or subjects of historical or cultural significance or interest.
- d) To exhibit to the general public as a museum, those historical and cultural objects acquired by the Society from time to time.
- e) To acquire such sites, real property, chattels, as are required for the purposes of the Society."<sup>16</sup>

### 4. Assess External Environment.

The assessment of the environment outside the organization is intended to reveal actual and potential threats and opportunities which may impact on the museum. Issues and conditions

to be considered include economic, social, political and technological trends and developments. An evaluation of various interest groups such as the open-air museum's visitors or users, its collaborators and competitors is an essential part of the external assessment.

In the case of the O'Keefe Ranch, there are several agencies and organizations who could have an impact on the site's future. The planning team may wish to contact The City of Vernon, The North Okanagan Regional District, The Ministry of Municipal Affairs, Recreation and Culture and The Ministry of Tourism and Provincial Secretary. These governmental bodies can provide valuable information on the political climate and possible changes in funding at the local, regional and provincial level.

The Chamber of Commerce, local and regional tourist associations, service clubs, heritage and historical societies can provide information on their research and promotional activities. Service clubs, heritage and historical societies are often eager to hear guest speakers and to get involved in local issues. It may be of interest to Ranch administrators to find out about regional tourism marketing plans currently being developed and what role the Ranch may play in them. A presentation outlining the purpose of the strategic plan and delivered by a Ranch representative could open up discussion with such interest groups who may be able to share knowledge and ideas of value to the planning team.

## **5. Assess Internal Environment.**

The assessment of the internal environment considers the state of the organization itself - its strengths and weaknesses. The planning team of Historic O'Keefe Ranch should review the Ranch's financial situation, its human and technological resources, its organizational structure and



approach to management. Consideration should also be given to the condition of its collections, buildings and grounds, site security, curatorial and interpretive programs and visitor services.

Having gathered input from various interest groups in the external environment and having evaluated the condition of the Ranch's internal environment, the planning team should identify the strengths and weaknesses, opportunities and threats impinging upon the organization.

Steps 4 and 5 are often referred to as SWOT analysis - the identification of strengths and weaknesses, opportunities and threats. These steps are critical as any successful strategy will advance strengths and seize opportunities while rectifying or minimizing weaknesses and threats.

#### **6. Develop Scenarios.**

Characteristic of strategic planning is the development of scenarios. A scenario is a vision of a future situation. An organization may develop several scenarios to take into account different possible futures, i.e. best case to worst case scenarios. Contingency planning for both positive and negative futures is an important part of the strategic approach.

Three basic components of a scenario are:

- a) The baseline - Where are we?
- b) Future images - Where do we want to go? What could happen?
- c) Future paths - How do we get there (and avoid the pitfalls)?

The Ranch's planning team may choose to develop scenarios which take into account changes in the political and economic climate which may, in turn, affect levels of funding for the site. Other scenarios may be developed around a possible increase or decrease in visitor levels. For example, this country's latest recession could restrict Canadians' ability to travel and spend money at historical/cultural attractions. On the other hand, the war in the Persian Gulf and threat

of terrorist attacks could deter North Americans from travelling overseas, thus leading to a possible increase in the numbers of Canadian and American visitors to the Ranch. Preparing for alternative futures can help the Ranch to cope with changeable conditions.

## **7. Identify Strategic Issues, Strategies and Develop Action Plans.**

*Strategic issues* are fundamental policy questions affecting the organization's mandates; mission and values; product or service level and mix, clients, users or payers, cost, financing, management or organizational design.<sup>17</sup>

If the open-air museum is to survive and flourish it is important that strategic issues be handled promptly and effectively. Should the museum administrators fail to address a strategic issue they may be unable to evade a threat, take advantage of an opportunity or both.

A strategic issue should be described in a concise statement. It should be posed as a question and must be an issue the museum administration can do something about. The attention and resources of most open-air museums are limited enough without indulging in matters it can do nothing about.

As I have been either directly or indirectly associated with Historic O'Keefe Ranch since 1988, it is possible for me to anticipate a few key issues which may emerge from a strategic planning process undertaken by the Ranch's planning team.

For example:

- \* What should the Ranch administration do to increase visitor numbers?
- \* What could be done to improve the Ranch's interpretive program?

While the first issue identified here is essentially a marketing problem and the second is obviously related to interpretation, there may be several other important issues revealed through the strategic planning process (see FIGURE 1-2).

Having identified the strategic issues facing the organization, the planning team must develop strategies and action plans which are needed to attain the desired future. It is at this point that "second level" planning comes into play.

It may appear as though strategic planning is a linear, step-by-step process undertaken by a special "strategic planning team", in fact, this is not and should not be the case. An organization should think and act strategically at all levels. The process is iterative and steps may be repeated as necessary. Once familiar with the concept of planning strategically, an organization may move rapidly and intuitively through the process; decisions made and actions taken along the way.

Chapters Two and Three provide explanation of two second level planning applications; marketing and interpretation.

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## **CHAPTER TWO**

### **MARKETING IN OPEN-AIR MUSEUM MANAGEMENT**

Historic O'Keefe Ranch has a long and colourful past. Situated in a beautiful, rural setting, the Ranch has retained a substantial inventory of original buildings and a collection of approximately 10 000 artifacts. Unfortunately, the financial picture is not entirely rosy. The Ranch's long-standing financial difficulties have been the subject of numerous local newspaper stories, therefore it would come as no surprise should the Ranch administration decide that the issue of how to bring in more visitors and thereby increase revenue is of the utmost importance.

By increasing admissions revenue, the Ranch can become less dependent on variable and somewhat unpredictable government support while continuing to upgrade programs, services and staffing. Many social, cultural, historical and physical characteristics of the Ranch lend themselves to the creation of a highly competitive, distinctive, open-air museum product.

Just as in the for-profit sector, the success of the non-profit open-air museum is largely determined by its market which is composed of many segments. In addition to visitors, other stakeholders, in particular; individual and corporate donors, local taxpayers, various levels of government and other tourist industry organizations, maintain an interest in the success of the open-air museum.

Everything which the open-air museum visitor encounters and experiences at the site is part of that museum's "product." The product must be matched to the needs, preferences and interests of the visitor market if the organization is to survive. Ongoing evaluation and improvement of the product, based market research and oriented towards the organizational mission, is essential if Historic O'Keefe Ranch is to secure a competitive advantage.

## 2.1 INTRODUCTION TO MARKETING

The underlying concept central to marketing is exchange. One party offers something of value to another party in exchange for something of value. After the exchange both parties perceive themselves to be better off, since both voluntarily agreed to the exchange. "Marketing is the philosophical alternative to force."<sup>1</sup>

Because museum administrators may misunderstand the concept of marketing, they may still equate it with advertising, promotion and salesmanship. They may perceive it to be objectionable and too "sleazy" for their lofty organization. Selling is, however, only a small part of marketing. If the service or product is appropriate and if distributing, pricing and promoting are effectively done then very little selling is necessary. A thoughtful approach and more complete understanding of marketing can avoid the common criticisms outlined below.

### **Marketing is deceptive**

Marketers are charged with persuading people to pay for what they do not need nor want. People are seen as the victims of high-pressure, manipulative sales techniques.<sup>2</sup> In fact, marketing is undertaken before any selling takes place and takes the form of a carefully developed program. It is not a haphazard activity which attempts to obtain a desired response from the public.

Any attempt to deceive the public will eventually have negative repercussions for the organization. For example, an open-air museum may promote itself so as to raise the expectations of visitors to such an extent that they will anticipate a certain degree of excellence in exchange for their admission fee. These visitors will leave disappointed or even angry if the actual experience does not meet the high standards alluded to in the organization's advertising.

In exchange for the visitors' time and money, the open-air museum must offer a level of quality which meets or exceeds the expectations set by their advertising or promotional materials.

### **Marketing is a waste of the public's money**

In the non-profit sector, donors may be a significant part of the market and will not be inclined to offer their support if they believe the organization will not make good use of their contribution. The marketing expenditures of non-profit organizations which rely heavily on donors' and/or tax payers' contributions may be closely watched by the public to see that their expenses do not become excessive relative to the revenue being raised. Naturally, any organization should avoid marketing expenditures which do not produce acceptable results.

In exchange for their contributions, taxpayers and donors will expect the open-air museum to carefully manage their finances and offer a high quality "product" while preserving the historic resources entrusted to their care.

### **Marketing research is an invasion of privacy**

People are subjected to a variety of market research techniques by a diverse range of companies and organizations. People may resent the interruption of their personal lives by researchers who contact them at home either by phone or door-to-door. Questionnaires distributed by mail may be considered as too much of a bother to complete and are often lumped together with other "junk mail." Even on vacation people cannot escape the market researcher as they are approached to answer questions on their travel and leisure activities or requested to complete the visitor survey form at any number of recreational and cultural sites. Questions regarding one's income, education, religious beliefs and so on are often considered to be "none of your business!"



Unfortunately, the public may lose sight of the fact that market research is conducted in order to discern the needs and desires of people and their opinion of the organization's present offerings of products and/or services. In exchange for the time and effort taken by people to respond to survey questions, the open-air museum must be prepared to act upon the feedback they receive. This requires a shift in "mentality" among museum administrators from a product-orientation to a market-orientation. Market information should enable the organization to deliver a greater degree of satisfaction to its customers, however, it must be obtained with respect for the public's privacy.

Marketing refers to the identification and servicing of target markets. Organizations should not attempt to be all things to all people and serve every market. The organization's product or service should be tailored to meet the markets' needs and preferences rather than developed according to the organization's preconceived ideas. If the organization attempts to impose on the market a product or service which is not matched to the markets' needs or desires the effort will likely have disappointing results.

Thus described, it is not difficult to see how marketing encompasses many of the principles of strategic planning. As in strategic planning, marketing necessitates a review of the organization's overall objectives prior to the formulation of marketing objectives. This will help to ensure that the results of marketing efforts are in accordance with the organization's underlying purpose.

## 2.2 A MARKETING PLANNING PROCESS

With reference to Historic O'Keefe Ranch, it was noted in Chapter One that the question of how to attract more visitors was one possible strategic issue to emerge from a strategic planning process. This is essentially a marketing problem and there is a systematic process which may be followed in order to resolve this issue. I have based the following series of steps on a marketing planning process described by Victor T.C. Middleton in Marketing in Travel & Tourism (1988).<sup>3</sup>

The Marketing Planning Process:

1. Identify Market Segments
2. Evaluation of the Visitor Experience or "Product"
3. Set Objectives
4. Identify Productive Methods of Promotion and Advertising

The process has been reduced to its essential components in order to "de-mystify" strategic marketing and provide an easy-to-follow planning process for open-air museum administrators without extensive marketing experience.

### 1. Identifying Market Segments

This stage of the process involves research into total market trends and trends within particular market segments. The following are just a few ways in which market information may be obtained at an open-air museum.

Something as simple as a guest book can provide information about where visitors are coming from and their general impressions of the site. More detailed information can be

obtained through a visitor questionnaire. Questionnaires may be developed in-house or prepared by a professional market researcher (should the budget permit). The questionnaire may be self-administered by the visitor, or conducted by hired personnel. If time, budget and/or expertise do not permit the development of a questionnaire, local, regional or provincial tourist information may be obtained through the Chamber of Commerce, local or regional tourist associations or from the provincial government.

Site managers should consider the profile of their own as well as their competitors' visitors. Tourist information is available in studies such as "Visitor '89 - A Travel Survey of Visitors to British Columbia"<sup>4</sup> and "Resident Travel in British Columbia".<sup>5</sup> Studies such as these provide answers to some of the commonly asked questions regarding the open-air museum visitor's origins, destinations, demographics, expenditures etc.

Market segments typically of interest to an open-air museum are:

- "1 Local residents living within approximately half an hour's drive from the site.
- 2 Regional residents making day visits away from home and drawn, depending on the motivating power of the site, from a distance of up to two hours' driving, or more in the case of sites of national significance.
- 3 Visitors staying with friends and relatives within about an hour's drive from the site.
- 4 Visitors on holiday staying in hotels, motels, trailer parks, campgrounds, cabins, and other forms of commercial accommodation within about an hour's drive from the site.
- 5 Group visits, typically arranged in association with coach companies, or through direct marketing contact with groups made by the attraction's management.
- 6 School visits and other educational groups."<sup>6</sup>

This type of information can often be derived from business records and visitor surveys and may be separated into various sub-segments as determined by region or country of origin, trip purpose, income or educational level, etc.

The market may also be segmented by age groups. With many cash registers it is possible to keep a daily record of both the total number of visitors and the number of visitors within different age groups. For example, O'Keefe Ranch attendance statistics indicate that the number of seniors visiting the Ranch during 1989 was up 44% over the previous year. This was the highest percentage increase of all admission age groups which include: adults, seniors, students, children, children under 6, tour groups and families.<sup>7</sup> Records such as this are a ready source of market information and, if maintained over a number of years, can reveal trends within market segments.

Seniors, or "empty nesters," are well-suited for travel during the shoulder seasons as they usually do not have school age children. Parents with school-age children are often obligated to travel during July or August. This does not mean, however, that the marketing effort should ignore younger people and families.

Regional visitors or "day trippers" are another market segment that the Ranch may endeavour to attract. Regional visitors are not restricted by school vacation periods, nor do they need overnight accommodation. Those people, families in particular, residing within two hours drive of the Ranch could conceivably be a market segment with excellent potential for growth. For example, the O'Keefe Ranch Visitor Survey conducted in 1989, revealed that 19% of respondents were from the North or South Okanagan and 18% of all respondents were on a day visit.

The survey also revealed that 81% of respondents were travelling by car and 30% of respondents learned about the Ranch while driving by. This evidence may suggest that Ranch administrators should monitor traffic flows on regional highways, situate eye-catching signs at key junctions and at the approaches to the site. Such highway marketing techniques will draw the motorist's attention to the site and may help to keep its image up front in their minds as they travel through the area.

Attempting to attract greater numbers of visitors to the site is premature, however, without a thorough assessment of the product and support services available to those visitors.

## **2. Evaluation of the Visitor Experience or "Product"**

If operating in an environment where there is little or no competition, an organization may lack the motivation to deliver high quality services and products. Consumers, or in the case of museums, visitors, may tolerate and accept unsatisfactory goods and services when they have no other choice. The fact of the matter is, "given the growth of new attractions and destinations,"<sup>8</sup> museums of all types operate in an increasingly competitive environment.

What the museum has to offer the public will, of course, vary according to the museum. Generally speaking, both traditional and open-air museums offer a combination of education and enjoyment. Museums can be a valuable resource to formal education from the primary to post-secondary levels.

If formal education is defined as that which is offered in a classroom, lecture or other directed format then the education offered by a museum would be considered largely of an informal nature. For the most part, people visit museums on a voluntary basis. Museums are considered to be places of peace and quiet, "a sort of haven or refuge in which to relax and

forget more mundane things."<sup>9</sup> Visitors may browse at their own pace, free to linger in areas of interest and to skip those less captivating. In this way, the visitor may relax while partaking of a special kind of educational experience. Those objects and places which reflect our past, present and lead us into the future are made meaningful through first-hand contact and inciteful interpretation.

Education and enjoyment are just part of the visitor's total experience at an open-air museum. It is the overall visitor experience which constitutes the museum's "product." The visitor begins to "consume" this product immediately upon arrival at the site. The natural, cultural and historical resources along with the interpretation of these resources may be considered, by some administrators, as the open-air museum's primary consideration. Support services such as signs, washrooms, parking, food and souvenirs may be thought of as secondary in importance. This is a dangerous attitude to adopt.

Visitors may be left with a negative impression when specific incidences and encounters at a site have been less than satisfactory: 'the washrooms were dirty'; 'the guide book was expensive'; 'the soup was cold' or 'the waitress was rude'. Tourist oriented businesses and organizations should be concerned with each others activities, products and services because a single, negative experience at one location can taint the visitor's impression of the whole community or region.

On the other hand, a positive impression is the result when general experiences are favourable: 'the people were friendly' or 'the atmosphere was pleasant'.<sup>10</sup> Less tangible elements such as a feeling of welcome, friendliness and helpfulness of staff and the general

"ambience" of the site play vital roles in the creation of a pleasurable, satisfying visitor experience.<sup>11</sup>

If an open-air museum is to develop and perpetuate visitor satisfaction, it is imperative that support services be granted as much attention as other elements of the product. If it is revealed that certain short-comings or deficiencies exist, steps can be taken to improve the situation.

This evaluation may, in turn, lead to the development and implementation of other action plans in areas such as visitor services, personnel, interpretation or security.

### 3. Setting Objectives

Armed with knowledge of the site's market segments, trends within these segments, an assessment of the site's product or experience which can be offered to the visitor along with other internal and external factors, marketing personnel can establish their objectives.

In order for an organization to be able to measure the results of marketing tactics, objectives must be specific and quantifiable. For example, Historic O'Keefe Ranch may consider a marketing objective such as: "To increase admission revenue by 20% between opening day (Mother's Day) and closing day (Thanksgiving) 1992."

Should the administrators of Historic O'Keefe Ranch decide to develop a marketing plan with the objective of attracting more visitors to the site, they must remember that July and August are peak tourism months in the North Okanagan. Correspondingly, there are many days during July and August when O'Keefe Ranch is operating at or near capacity. Visitor numbers swell to the point where both interpretive and administrative staff are pressed to the limit.

While the Ranch is very popular during the summer months it is strictly a seasonal operation, open from May to October. In 1989, attendance at the Ranch during May and June was 40% of the July - August total, while September and October visitors numbered only 32% of the peak season total.<sup>12</sup> Through marketing, it is possible for the Ranch to attract more visitors and to direct a good part of this increase towards the slower, shoulder season months (May, June, September, October).

From the analysis of market segments and trends conducted during the initial stages of the process it may be possible to discern which market segments should be targeted. The information may reveal, for example, that older persons travelling by bus tours or R.V.s constitute a significant part of the site's visitors. It may also be decided that adults and families from within the surrounding area (e.g. within two hour's drive) have strong potential.

#### **4. Identify Productive Methods of Promotion and Advertising**

Middleton states that: "the most productive promotional tools (will be) aimed at creating and maintaining awareness and interest in the site."<sup>13</sup>

Recognizing the Ranch's ongoing financial struggle, one could assume that their marketing budget would be rather limited. Given this reality, Ranch administrators should seek out and fully utilize opportunities for free or low cost advertising and publicity. Print, radio and television media could be invited to cover special interest stories which may originate from, or be related to, Historic O'Keefe Ranch.

Co-operative advertising and promotion may prove to be a productive method of attracting visitors to the site. For example, Historic O'Keefe Ranch may enter into an agreement with tour bus operators which could return benefits to both parties. With the Ranch as an added stop on



the tour route, the site would benefit from increased exposure and increased visitor revenue while the tour operators would be able to provide customers with an added incentive to purchase their product. Similarly, the Ranch may forge linkages with local hotels offering accommodation packages which include admission to area attractions. In this manner, the Ranch is able to secure additional exposure and visitor revenue while augmenting the hotel's accommodation product.

It may be advantageous to the open-air museum to monitor the marketing and product development strategies of other, comparable, sites. It may also be worthwhile for open-air museums to consider linkages with each other such as through joint advertising of "heritage circle tours." In this way, competitors can become collaborators; sharing the benefits of cooperation.

Special events are an ideal method of "creating and maintaining awareness and interest". They can also be an appropriate revenue booster for the shoulder season months. O'Keefe Ranch is an excellent venue for outdoor special events; the variety of which are limited only by the organizers' imagination. Events which have been successful in the past, have low overhead and fit thematically with O'Keefe Ranch would be most desirable. Corporations are ideal targets for the sponsorship of special events. The sponsoring company could provide money to advertise and stage the event, prizes if applicable and in return would reap the benefits of much positive publicity.

Historic O'Keefe Ranch, on the other hand, would benefit from the publicity and media coverage which would draw an increased number of visitors to the site. Regional visitors are often repeat visitors as they bring with them their children and out-of-town guests. Repeat visitors would appreciate seeing something new and exciting. Seniors may enjoy reminiscing

about the old days as they partake of special events exhibiting or demonstrating aspects of rural life in a bygone era.

In 1991 O'Keefe Ranch hosted the "Cowboy Poetry Roundup and Trappings Show," May 24-26. Corporate sponsorship was not secured for this event as it was the first of its kind to be held at O'Keefe Ranch. Businesses are generally reluctant to fund first-time events since their potential for success is unknown. In the future, O'Keefe Ranch may pursue corporate sponsorship with the object of making the Cowboy Poetry gathering an annual event.

The annual old-fashioned threshing bee held at O'Keefe Ranch is another example of the type of event which could attract corporate sponsorship. The scope of the event could be expanded to include demonstrations of other pioneer ranching and farming activities, children's games, contests, traditional food, music etc.

Other special events appropriate to O'Keefe Ranch themes and compatible with the rural setting include: antique auto shows, arts and crafts displays and/or classes, barbecues, barn dances, country or folk music festivals, farmers market, hayrides, a small-scale rodeo, plowing contests, roping demonstrations, dog, cat or horse shows, native theatre or music presentations, antique auctions and others too numerous to list.

Special events such as these can make the past come alive for visitors of all ages and backgrounds. Parents would enjoy sharing an educational yet fun experience with their children, overseas visitors are often eager to see something of the "old west," and some older visitors may even remember the days when such activities were part of the farming and ranching routine.

As tactics are decided upon and implemented their results must be monitored. Those which prove to be less successful may need to be modified or abandoned in favour of other, potentially more productive, methods.

### Summary

As in business, a non-profit organization such as one responsible for an open-air museum, can enjoy several positive results from a well researched and considerate marketing program. Marketing applications can be employed to boost revenue and counter-act the financial limitations of a seasonal open-air museum.

An open-air museum administrator may conclude that one way to increase revenue and move down the road to greater self-sufficiency, is to attract more visitors to the site. This is certainly true, but there are some important things to consider before embarking on a vigorous promotional campaign.

Market segments with good potential for growth should be identified. Museum administrators may consult published sources of tourism information and statistics or they may conduct their own survey in order to answer questions about their visitors and to obtain feedback on facilities and programs. Staff are an important, yet often overlooked, source of visitor information. Interpreters, cashiers and maintenance people are routinely in touch with the visitors and can provide insights into their likes, dislikes and frequently asked questions.

The open-air museum must consider the various components of the visitor's experience at the site which, together, constitute the organization's product. This includes aspects such as parking facilities, handicap access, visitor-staff contact, interpretation, food and beverage service

etc. The extent to which the site's resources and existing staff can handle increased numbers of people must be taken into account.

Market research can help the open-air museum to identify the needs and interests of various visitor groups or market segments. Monitoring such information enables the open-air museum to develop programs and services to satisfy its visitors or, in other words, to achieve target market satisfaction.

The public, today, may choose from a vast array of leisure-time pursuits. Given this reality, many museum administrators have come to realize, albeit somewhat reluctantly at times, that there is a place for marketing in the realm of museum management. Any service or product, however honourable, vies for the public's money, time and attention with many others.

Successful competition is only likely to be achieved within this market by emphasizing the 'unique selling proposition' of each project. This should not be difficult with heritage-based projects and is therefore one of their great strengths.<sup>14</sup>

A strategic approach to management which incorporates the concepts of marketing should provide open-air museum administrators with knowledge of a broad range of factors impacting upon their organization. Administrators armed with this knowledge and responsive to changing conditions, should be able to meet the competitive challenge without compromising standards of curatorial care.

A progressive administrative team would readily agree that strategic planning is a function of the open-air museum which is essential to its survival. When administrators of open-air museums appreciate the nature, intent and potential of marketing; they will surely realize that it is also a vital part of the management of their organization.

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14. Op Cit., Mallum, p.48.

## **CHAPTER 3**

### **INTERPRETATION: PLANNING AND EVALUATION**

Although people visit open-air museums for relaxation and enjoyment, they may also have a desire to learn something about the area, industry or period of history which the museum represents. Interpretation is a type of communication which provokes thought and enriches the experience of the open-air museum visitor.

#### **3.1 INTRODUCTION TO INTERPRETATION**

In 1957, Freeman Tilden provided a concise definition of interpretation which remains widely accepted today.

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.<sup>1</sup>

Several points may be made about Tilden's definition.

Though interpretation can be considered an educational activity, it is not so in a formal sense. People partake of interpretation voluntarily, primarily in a recreational context. Open-air museums provide a special kind of educational experience, obtained in an enjoyable fashion in an informal setting.

Interpretation may take many forms but it is usually encountered on-site by the visitor. It is this firsthand experience which brings the interpretive message alive and leaves a lasting impression with the visitor.

In some cases, interpretation may occur either before or after a visit to an open-air museum. A person may have acquired printed interpretive material prior to their visit or may obtain such materials on-site to be read and enjoyed after their visit. Correspondingly, an

interpreter may speak with an interest group such as a heritage society or make a visit to a classroom to talk with young students.

A key attribute of interpretation is that it is more than factual information. Interpretation should help the visitor to develop an interest and appreciation of the cultural resources and geographical area served by the museum. This objective is not to be attained through the recitation of facts but by linking or contrasting information about the cultural resource to something within the visitor's realm of experience. For example, a booklet produced by the staff of the Vernon Museum, entitled "Steamboats of the Okanagan," conveys a vivid picture of how travel in the Okanagan Valley has changed since the early days when transportation up and down Okanagan Lake was by rowboat:

With occasional help of a small sail the Captain rowed from one end to the other, about 65 miles in straight lines. The round-trip from Okanagan Landing to Penticton and back took about 9 days, about 15 miles per day, camping on the beach at night, shooting deer for food. A passenger a month was usual...<sup>2</sup>

A person reading this passage would be struck by the contrast between travel then and now; which may lead one to contemplate the entirely different way of life in the past and the determination, strength and courage of our pioneers.

Tilden cites a very different example which he observed in the Witte Museum in San Antonio, Texas. A small sign on a case displaying a variety of West Texas plants used by prehistoric Indians read:

Do you need a water bucket? A pair of shoes? a blanket, floor mat or rope? If so, the materials in this case (sotol, lechuguilla, bear-grass, devil's shoestring, etc.) will serve your purpose.<sup>3</sup>

The visitor reading this sign is immediately able to identify with the people of this ancient culture because we have similar needs today.

The places, objects, man-made and natural features deemed to be worthy of interpretation are innumerable and widely diverse. The people who plan and deliver interpretive programs bring to the task their own unique set of experiences, educational backgrounds, aptitude and enthusiasm. In addition, the means and methods of interpretation are many and varied. With so many variables it may be helpful to reiterate Tilden's six principles of interpretation. These six principles provide a sound framework upon which any interpretive program should be based.

I. 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.

II. Information, as such, is not Interpretation. Interpretation is revelation based upon information. But they are entirely different things. However, all interpretation includes information.

III. Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical or architectural. Any art is in some degree teachable.

IV. The chief aim of Interpretation is not instruction, but provocation.

V. Interpretation should aim to present a whole rather than a part, and must address itself to the whole man rather than any phase.

VI. Interpretation addressed to children (say, up to the age of twelve) should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. To be at its best it will require a separate program.<sup>4</sup>

### 3.2 INTERPRETIVE MEDIA FOR OPEN-AIR MUSEUMS

Grant W. Sharpe defines interpretive media as the "means, methods, devices, or instruments by which the interpretive message is presented to the public."<sup>5</sup> There are a great many factors to consider before selecting a particular method to deliver the message. Some of



the variables which will have an impact on this selection include the visitor, the resource and the location.

### **The Visitor**

Visitors come from a wide range of educational and cultural backgrounds. Their mental and physical abilities, language, age, travel objectives and place of origin may differ greatly. While it is not possible to accommodate all these diversities all of the time, the interpretive planner must take these factors into consideration when developing the interpretive program. The interpretive planner should evaluate alternative means by which the open-air museum may meet the varied needs of its visitors.

Many public buildings and recreational areas are now being built or renovated to accommodate the needs of people with less than full mobility. Unfortunately, the nature of open-air museums does not always facilitate the incorporation of handicap access to all structures and outdoor areas. The addition of wheelchair ramps or lifts may necessitate extensive alterations to the structure of heritage buildings. However, with care and creativity, a greater degree of accessibility could be attained at many open-air museums.

Most visitors to open-air museums lack specialized knowledge pertaining to heritage preservation. Interpretation, whether printed or personally delivered, should avoid the use of difficult words and jargon. If possible, some printed material could be made available in languages familiar to the site's most common foreign visitors. Interpretive staff with proficiency in a second language would be a strong asset to the interpretive program.

## **The Resource**

In an open-air museum, the interpretive media should be compatible with the characteristics of the heritage resource. For example, it may be preferable to situate a self-supporting sign adjacent to a heritage building rather than to nail the sign directly to the wall of the structure. The interpretive message should help the visitor to understand and appreciate the irreplaceable and often delicate nature of heritage resources. In this way, interpretation can function as a management tool. If the visitor respects the special qualities of the open-air museum's exhibits and structures he/she is less likely to act in a thoughtless or careless manner.

## **The Location**

The media selected to convey the interpretive message must be compatible with its location. Climatic conditions and topography of the area will influence the materials, design and method chosen for outdoor interpretation. The number and density of visitors is another factor to consider. For example, where a number of visitors gather at a point of interest it would not be appropriate to have each playing their portable audio tape machine.

Because open-air museums often incorporate a variety of indoor and outdoor exhibits, structures and site characteristics, a single method of interpretation is not usually possible nor desirable. A mix of both personal and non-personal approaches to interpretation is often the best way reach the wide variety of visitors and to minimize impact on the site and its resources.

## **Personal Interpretation**

Methods of personal interpretation include such activities as guided walks, presentations and demonstrations. The various approaches to personal interpretation are not necessarily mutual-

ly exclusive. A presentation delivered by an interpreter may also include a demonstration and perhaps an opportunity for audience participation. For example, an interpreter at a pioneer homestead could stand before his/her audience and explain how the early settlers kept a few cows to supply their dairy products. Alternatively, the interpreter could be dressed in period costume and actually demonstrate how to milk a cow, separate cream, churn butter, ice cream etc. The opportunity for the visitor to "have a go" and sample the final product lends a spirit of adventure and fun to what could have been a sterile presentation. Unfortunately, many types of demonstrations entail administrative difficulties. Lack of money or personnel often hinders the development of demonstrations at open-air museums.

One of the most positive attributes of the personal approach to interpretation is that it permits the flow of two-way communication between the visitor and interpreter. While personal interpretation has many desirable qualities, it is often too costly for an open-air museum to hire and retain a large enough staff of qualified interpreters to cover all the interpretive bases.

### **Non-Personal Interpretation**

Non-personal interpretation is often a vital part of the open-air museum's interpretive program. Some visitors may even prefer non-personal interpretation so they can wander about the site at their own pace. They may not want to worry about what time they must meet at a particular spot to partake of a personally delivered presentation, guided walk or other activity. Signs, brochures and the like can be skimmed by the visitor in a hurry. The same message delivered by a live interpreter cannot be quickly scanned in this way. Conversely, visitors can

pause and re-read all or a portion of the text if they so desire. Most visitors would not repeatedly interrupt a live interpreter's presentation in this manner.

Signs and brochures have been mentioned as a means of non-personal interpretation. These "low tech" methods are relatively inexpensive and require little maintenance. Brochures should be periodically updated and reprinted while signs may require cleaning, repair and repainting (depending on the materials used).

Audio-visual devices may be incorporated into the interpretive program, however, their inclusion should be carefully considered. Mechanical, or "high tech," methods of non-personal interpretation can be expensive to purchase, install and maintain. There are few things more frustrating to the open-air museum visitor than to encounter devices such as speaker posts, slide-tape presentations or interactive computer programs which are malfunctioning or completely out-of-order. If mechanical devices are to be used, the museum's administration must evaluate the costs and benefits of such an approach. Inoperative devices must be repaired or replaced promptly.

The interpretive planner has much to consider when developing the non-personal components of the interpretive program. If the interpretive planner has little training or experience in the field of interpretation, he/she would benefit by reading the texts referred to in this document by both Sharpe and Tilden. Training courses related to heritage interpretation are also available and very helpful if their scheduling, cost and location are favourable.

### 3.3 PLANNING FOR INTERPRETATION

Without a well thought out interpretive plan, the administration of an open-air museum may encounter stumbling blocks which could otherwise be avoided. Haphazard interpretation may fail to address issues or information of interest to the visitor. Natural or man-made features may become damaged or destroyed if visitors do not understand the implications of their actions or are not directed away from sensitive areas. In addition, an interpretive plan is often a prerequisite to securing funding for the establishment or upgrading of an interpretive program. When the consequences of not developing an interpretive plan are understood it becomes obvious that the interpretive planning process should not be considered peripheral to the overall planning and management of the site. Without a well planned, enjoyable and up-to-date interpretive program the open-air museum "is not providing maximum benefits to the visitor."<sup>6</sup>

It seems almost redundant to state at this point that interpretation is for people. People are the consumers of interpretation; the focus to which the interpreter's and the interpretive planner's energies are directed. With this rather obvious notion in mind, it is not difficult to see interpretation's relationship to marketing.

Fundamental to successful marketing is the need to know who the market is. In the case of open-air museums, the interpretive planner must learn as much as possible about the visitor before developing an interpretive program. Several means which may be employed to gather information about the visitor were discussed in Chapter Two.

In short;

Our challenge today is to ensure that interpretation is based upon our understanding of the resource being interpreted, and understanding the character and nature of our customers.<sup>7</sup>

The concept of interpretation encompasses the ideals of customer care. It is unlikely that even a well presented interpretive message will have a favourable impact on the visitor if other visitor services are unsatisfactory. If visitors encounter dirty washrooms, high prices, unfriendly staff, poor quality food or gift items, inadequate directional signs etc. they will probably leave with a negative impression. Fortunately, action can be taken to correct these day-to-day management problems. This also means that if management is receiving such negative feedback from the visitors, action *must* be taken.

The visitor wants the story told well and in an authentic, well managed environment with effective and trained staff. ...It is logical to suggest, therefore, that our primary concerns and messages are more likely to be effective and well received if we take more time and effort to get to know, to understand and to stay close to our customers.<sup>8</sup>

### **The Interpretation Planning Process**

The need to evaluate and possibly upgrade the interpretive program was identified in Chapter One as one of the issues likely to emerge should a strategic planning effort be undertaken by the administration of Historic O'Keefe Ranch. An interpretation planning process, such as the one outlined below, can provide a guideline for the interpretive planner assigned to the task of carrying out the O'Keefe Ranch evaluation. This planning process, like any other, is not written in stone. The following steps are intended as a guide, modifications may be made to suit particular sites and situations. Monitoring of the process is essential but is not included as an individual step in the plan because it should be an ongoing part of the process.

Some of the components of the interpretation plan have been dealt with in planning and policy documents previously prepared for the Ranch. For example, the objectives of the Society were defined in the organization's 1977 constitution (see also page 24), interpretation policy

statements, an inventory of heritage resources, as well as primary and secondary themes are contained in the "O'Keefe Ranch Concept Plan" prepared in 1982.<sup>9</sup>

### **1. Review Organizational Mission and Mandates.**

This initial step is fundamentally the same as that defined in the Chapter One outline of the Strategic Planning Process.

The terminology varies from one organization to the next, but whether it is a statement of mission, goals or objectives, it is important for the interpretive planner to keep these overriding directives in mind. Such a statement provides the framework within which the interpretive program can be developed.

### **2. Develop Interpretation Policy Statements.**

Policy statements pertaining to the interpretive program should be formulated by the organization's directors together with the manager or interpretive planner. A clearly defined statement of policy enables the board to seriously consider the interpretive program's financial and human resources needs when the annual budget is prepared. A statement of policy outlining the goals and objectives of the interpretive program will make planning for successful interpretation possible.

Without a statement of policy the interpretation program will eventually founder. A manager, left to handle interpretation in his/her own way, may be enthusiastic and resourceful enough to put together an enjoyable, provocative interpretive program. Nevertheless, if and when this individual should leave the organization, the success of the interpretive program will vanish as well. Furthermore, there is a strong possibility that interpretive efforts may be overlooked at budget time if well-defined policy does not exist.

Interpretation policy statements included in the 1982 O'Keefe Ranch Concept Plan are summarized as follows:

The concept of a "living museum", with animated display of historical themes and visitor participation should be developed at the O'Keefe Ranch. This should complement the more passive displays. ...

The implications are:

- a) programs and facilities should be designed for individual and group interpretation, and make use of community participation wherever possible;
- b) the first interpretive objective is to acquaint visitors with the history of the Ranch and Interior ranching, agriculture, regional settlement and the pioneer lifestyle;
- c) the second interpretive objective is to demonstrate the activities associated with early ranch and farm life.<sup>10</sup>

In 1989, a Three Year Plan was prepared by the Ranch manager which "provides for the systematic development and management of the resources of the O'Keefe Ranch" until 1993.<sup>11</sup> Within this plan, interpretation policy statements were updated and include reference to the recently acquired Schubert House.

These policy statements, intended to guide development of the interpretive program, are quoted as follows:

The ranching theme will continue to be emphasized through the development of displays and interpretive activities.

Wherever possible, actual ranching activities such as haying, grain harvesting, and livestock raising will be carried on.

Consideration will be given to the acquisition of artifacts and the development of a major exhibition on the life and artifacts of the B.C. Cowboy.

The Schubert House will be furnished in an appropriate period fashion and a display will be developed to depict the story of the Schubert Family and their place in the history of Western Canada. The Schubert House will be used to



demonstrate appropriate period home crafts such as quilting, spinning and weaving, and domestic activities.

The story of the ongoing cooperation between the Okanagan Indians and O'Keefe Ranch will be told in cooperation with the Head of the Lake Band.

Traditional crafts such as blacksmithing, leather work, woodworking, pottery and others will be encouraged and space provided for their practice.<sup>12</sup>

### **3. Inventory.**

The interpretive planner must have a complete and accurate list of the open-air museum's resources. Cultural and historical resources are the obvious focus of interpretation, however, natural features should not be overlooked. Particular plants, animals, climatic conditions or geographical characteristics may also be relevant to the site's interpretive themes. A thorough inventory and an understanding of the relationship between the objects, buildings and environmental features and the site and regional history provides the basis for good interpretation.

An extensive inventory of the Ranch's heritage resources is included in the 1982 Concept Plan. The entire inventory has not been repeated in this document, however, significant elements are included as part of the Ranch's interpretive program evaluation.

### **4. Develop Interpretive Themes and Concepts.**

Themes and concepts are the stories about the open-air museum which will be conveyed through interpretation.

A theme is a major area of discourse which delineates or limits the focus of interpretive activity. The theme is a broad general statement which should be unique to your site and is the first step in narrowing your focus.

A concept is a generic information component which refines the theme into one or more specific stories. Concepts specify which subjects of the potential range of subjects will form the story. Where the theme may be abstract in nature, the concept is concrete. It describes an action, process or thing. The concept should describe something specific to your site.<sup>13</sup>

The themes selected for Historic O'Keefe Ranch incorporate key elements in the site's history, its existing heritage resources and "provide the main focus for historical presentation of the site."<sup>14</sup> The primary and secondary themes as identified in the Concept Plan are:

Primary themes:

1. O'Keefe Ranch 1867-1920
2. Interior ranching 1858-1900

Secondary themes:

1. O'Keefe Ranch 1920-
2. Agriculture
3. Settlement

The 1982 plan also lists numerous concepts associated with both primary and secondary themes. For example, within the theme of "O'Keefe Ranch 1867-1920" there exist eight concepts, one of which is "O'Keefe and Greenhow families."

These themes and concepts continue to provide the focus for interpretive program development at Historic O'Keefe Ranch.

The *theme* defines the range of possible interpretive *concepts*.

## 5. Assess External Environment.

Factors outside of the open-air museum's organization have an important influence on the interpretive program. Trends in the tourism industry must be taken into consideration. This, once again, reiterates the need to know the market. The interpretive planner must have some idea about who the visitors are in order to design a program which will meet their needs and expectations.

There are many questions which could be asked about the visitors. The answers will affect the nature of the interpretive program. For example, parents may want to guide their

children through the site themselves and avoid organized tours. In this respect, non-personal media will allow parents to act as the interpreter for their children. The education level of visitors will influence the amount, type and presentation of information. The length of time which visitors spend at the open-air museum will also affect the extent and media of the interpretive program.

Visitor feedback is a valuable source of information when developing a new or seeking to improve an existing interpretive program. Some information about the visitors' response to the existing interpretive effort can be obtained through unobtrusive observation of their movements and behaviour around the site. A visitor survey may solicit responses pertaining to the site's displays, presentations and other interpretive activities and materials.

Some valuable information about the Ranch's external environment, namely the visitors, can be obtained from the results of a survey undertaken in 1989. Because the visitor survey was designed and conducted by Ranch personnel and not by a qualified market research analyst, statistical validity cannot be assured. Nevertheless, the results can provide some insight into visitor demographics, place of origin and their perceptions of the site. Results of the survey are summarized in Appendix One.

Questions frequently asked of the open-air museum's staff may shed some light on areas where the interpretive program could be improved. It may also be helpful to note what interpretive approaches are successfully or unsuccessfully employed at other comparable sites.

Economic trends will also influence the planning of the interpretive program. If the region is entering a recession people will likely have less disposable income to spend on travel. The open-air museum should be prepared to experience, at the very least, a decreased rate of

growth in visitation, or at worst, a decline in visitor numbers. While it is unlikely that the present interpretive offerings would be pared down in the event of an economic downturn, further development of the interpretive program may be postponed. If the economy is healthy and visitation is on the rise, the open-air museum's interpretive program and visitor support services must be prepared to handle increased numbers of people.

#### **6. Assess Internal Environment.**

Any open-air museum administration which is inclined to develop or upgrade an interpretation program should evaluate the circumstances existing within the organization. Just as external factors such as tourism and economic trends influence the interpretive plan, so too do internal strengths and weaknesses.

Personnel is one aspect of internal operations which must be assessed. Someone must be prepared to assume the role of interpretive planner if, as is usually the case, the museum is financially unable to hire a trained professional. In addition to his/her many other duties, the responsibility of planning the interpretive program is often entrusted to the manager.

The availability of funds is another important factor to be assessed. The board of directors must be able to tell the interpretive planner how much money can be allocated to the planning and implementation of an interpretive program in order for the planner to develop a program which can be established and maintained within the museum's budget.

When developing or upgrading an interpretive program it is vital to consider the number of interpreters which can be hired within the organization's budget. Interpreters with substantial training and experience will demand much higher wages than students with little or no

interpretive background. The nature of the interpretive program and the site's budget will determine how many and what type of interpreters can be employed.

The current financial circumstances at the Ranch do not allow for the hiring of much needed administrative help let alone qualified, experienced interpreters. In the past, the Ranch has hired and trained high school and college students for interpretive positions with the aid of federal "Challenge" grants. For the most part, these students have performed very well as interpreters. There is, however, a limit to the number of students which the Ranch can hire with these grants and this number can vary from year to year. Improvements to the interpretation program should be able to be implemented with a minimal need for additional, paid interpretive staff.

The open-air museum which has been established for a number of years should periodically evaluate their interpretive program. Evaluation criteria should be defined which can be applied to personal and non-personal interpretation of specific exhibits and structures. An evaluation revealing areas of strength and weakness within the present interpretive program will lead naturally to a strategy for program improvements.

The evaluation of the interpretation presently offered at Historic O'Keefe Ranch can be broken down into two categories:

1. Evaluation of personal (or active) interpretation.
2. Evaluation of non-personal (or passive) interpretation.

Through periodic evaluations, management can gauge the effectiveness of various types of interpretation over a period of time, the effectiveness of an interpreter over a season, and the accuracy and appropriateness of the interpretive message delivered to the audience.

Regular evaluation could benefit Historic O'Keefe Ranch in several ways. Evaluation can help interpreters to develop and improve their presentation skills, can ensure the interpretive program meets organizational objectives and is consistent with site themes, can assist the organization in meeting visitor expectations and can help management and staff make valuable use of their time in planning and delivering the program.<sup>15</sup>

## **7. Develop Action Plans.**

Having established interpretation policy statements, prepared a resource inventory, defined themes and concepts and assimilated information about the external and internal environments, it is time to decide on a course of action.

The interpretive planner needs to decide which media are most appropriate for each component of the interpretive program. If the first priority is deemed to be the provision of an interpretive brochure, then the interpretive planner must investigate the variety of ways in which this objective may be achieved. Matters for consideration include; paper and printing options, design options; i.e. "in house" or professional, layout of text and graphics, production and replacement costs, distribution point(s) and the number of brochures needed. The audience must also be considered. If, for example, the audience includes a significant proportion of young children or seniors larger print will be easier to read for both age groups. Small details such as this can make a big difference. It is also very helpful to the board if the interpretive planner can provide a reasonably accurate estimate of cost.

An implementation schedule should be formulated which would indicate when particular phases of the interpretive strategy will be initiated and completed. It would be wise to keep in mind the best to worst case scenarios (formulated in the larger strategic plan) which took into

consideration possible shifts in the museum's financial situation and visitation levels. If such conditions were to change, the implementation schedule and, possibly, the scale of the interpretive program would need to be adjusted accordingly.

### **8. Implementing the plan.**

More people may become involved in this stage of the process than any other. Depending on the interpretive program's scale and complexity, architects, exhibit designers, carpenters, sign painters, printers and others may play a role in the interpretive plan's realization. In order to ensure that the end result reflects the open-air museum's original intent, the interpretive planner will need to coordinate the activities of these specialists. The process of implementation should be flexible enough to accommodate adjustments due to unforeseen circumstances such as the unavailability of particular materials, construction delays due to inclement weather, labour disputes etc. The interpretive planner or site manager should see to it that implementation expenses remain within the allotted budget and should periodically report to the board on the progress of the plan's implementation.

### **Evaluation of Personal Interpretation**

The format for the evaluation of personally delivered interpretation is presented in FIGURE 3-1. The criteria developed for the assessment of personal interpretation could be applied to scheduled events such as presentations, skits and guided walks and to unscheduled, ongoing site and period interpretation offered by interpreters engaged in pioneer domestic and/or agricultural activities. Those criteria marked with an asterisk (\*), are most applicable to scheduled interpretive events.

Whether the interpretation is of the scheduled variety or not, the interpreter should be provided with a copy of the evaluation form so that he/she is aware of the assessment criteria. During a scheduled interpretive event, the evaluator should remain towards the back of the visitor group in order to minimize any distraction which may be caused by his/her presence.

The evaluator can assess ongoing site and period interpretation by simply spending some time at the interpreter's venue and discreetly noting observations as the interpreter carries out his/her activities and interacts with the visitors.

If possible, it would be preferable for the evaluator to meet with the interpreter immediately after the assessment to review the results. The evaluator must be honest yet sensitive, concise, constructive and should avoid criticism which is overly negative, accusatory, unclear, humiliating or otherwise destructive. The evaluator should encourage the interpreter to assess his/her own performance. Together the evaluator and the interpreter can discuss ways to improve problem areas. The meeting should be kept private and all evaluation documents should be treated as confidential.



FIGURE 3-1. EVALUATION OF PERSONAL INTERPRETATION

Type of personal interpretation _____			
Name of interpreter _____			
Name of evaluator _____			
Date _____		Weather _____	
*If applicable: Start time _____		End time _____	
Audience size _____ Children _____ Teens _____ Adults _____ 65+ _____			
	ACCEPTABLE	ACCEPTABLE WITH PROBLEMS	NOT ACCEPTABLE
<b>PRESENTATION</b>			
Voice .....	.....	.....	.....
Eye contact .....	.....	.....	.....
Confidence .....	.....	.....	.....
Enthusiasm .....	.....	.....	.....
<b>RELATION TO AUDIENCE</b>			
Warm-up .....	.....	.....	.....
Rapport .....	.....	.....	.....
Consider comfort and safety .....	.....	.....	.....
Use info. / words appropriate to audience .....	.....	.....	.....
<b>STRUCTURE/ CONTENT</b>			
*Begin on time .....	.....	.....	.....
*Introduction .....	.....	.....	.....
*Organization / flow .....	.....	.....	.....
*Conclusion .....	.....	.....	.....
Support materials .....	.....	.....	.....
Info. accuracy .....	.....	.....	.....
Fit with site Themes .....	.....	.....	.....
Note additional comments on reverse.			

Because this portion of my MDP was prepared during the O'Keefe Ranch off-season, it was not possible to conduct actual evaluations of personally delivered interpretation. A copy of the evaluation form has been submitted to the site manager with the recommendation that evaluations be conducted 2-3 times per season.

The following is an example of an evaluation of non-personal interpretation offered at Historic O'Keefe Ranch. Results of the evaluation revealed a certain degree of weakness in this aspect of the site's interpretive program. It should be noted, however, that this evaluation, like many others of its kind, is subjective in nature. The opinions expressed by this author may differ from those of others.

#### **Evaluation of Non-personal Interpretation**

A few general comments about the Ranch's non-personal interpretation should be made before summarizing the evaluation results.

Non-personal interpretation media at the Ranch is simple and low-tech. Budgetary restrictions have not allowed significant improvements to be made to the non-personal interpretation program for several years. A general assessment of both the content and condition of all interpretive materials is overdue as wear and tear have begun to take an obvious toll on both indoor and outdoor media.

Visitors arriving at the site are given a one-colour brochure which is printed on legal size paper and folded accordian-style. This brochure provides information on the Ranch's hours and dates of operation, mailing address, a map indicating the site's location relative to major highways and nearby cities, a site map identifying 25 points of interest at the Ranch itself, a short

list of the Ranch's major attractions and four paragraphs about the site's history. This brief historical summary notes significant influences and events in the evolution of the Ranch from its inception in 1867 to the establishment of the O'Keefe Ranch and Interior Heritage Society in 1977. However abbreviated, this history is sufficient to provide a basic understanding of why and how the Ranch originated and establishes the context for what the visitor will see at the site. Nevertheless, the brochure provides very little interpretation of even the most notable Ranch buildings, (i.e. "LOG HOUSE - 1876 First home of Cornelius and Mary Ann O'Keefe"). Because the brochure is not an interpretive document, it has not been included as part of the evaluation of non-personal interpretive media.

A second booklet containing much more interpretive material about the Ranch, is available to visitors for a fee of \$2.99. This booklet was sold through the gift shop which visitors pass through as they exit the site. In the past, very few visitors have purchased the booklet before touring the site. Beginning in 1991, this booklet will be sold at the Ranch entrance. The number of visitors willing to purchase this booklet in addition to paying their admission fee is highly questionable, therefore, it has also not been included in the evaluation.

Ranch administrators should be commended for their provision of interpretive brochures which have been translated into French, German, Dutch and Japanese. These simple, photocopied hand-outs provide information about the site's history and its key heritage features. The Dutch and Japanese versions unfortunately lack the site map.

Using the form depicted in FIGURE 3-2, I evaluated the non-personal interpretation pertaining to 14 exhibits and structures at Historic O'Keefe Ranch. The one-page format and numerical rating scale simplifies the evaluation procedure. In addition, the numerical scale makes

it possible to compare the results of successive evaluations over a period of time. Consistency is important if site management intends to evaluate the interpretation of a number of structures and exhibits over a number of years. In addition, the responses of different evaluators to the same interpretation can be compared to reveal any exceptional irregularities.

FIGURE 3-2. EXAMPLE OF AN EVALUATION OF NON-PERSONAL INTERPRETATION

Name of evaluator _____ Date _____	
Name of structure / exhibit: O'Keefe House	
Type(s) of non-personal media used to convey message: - minimal non-personal interp. - small signs, upper storey only	
Evaluation Scale: 1 Poor 2 Below Average 3 Average 4 Above Average 5 Excellent NA Not Applicable	
Rating of interpretation media:	
Communication of Ranch themes	3
Legibility to visually impaired	2
Accessibility of exhibit to physically handicapped	3
Main level	1
Upper level (if applicable)	
Design/construction of interpretation media	3
Present physical condition of interpretation media	3
Appropriateness of interpretation media to subject & setting	3
Extent to which message conveys more than factual information	3
Interpretation appropriate to children	3
Interactive/participatory nature of interpretation	1

FIGURE 3-3. SUMMARY OF NON-PERSONAL INTERPRETATION EVALUATION

STRUCTURE / EXHIBIT		1	2	3	4	5	6	7	8	9	10	11	12	13	14
C R I T E R I A	A	3	4	4	3	3	3	3	2	2	1	2	2	1	3
	B	2	3	3	2	3	3	3	3	-	2	3	3	3	3
	C	3	3	NA	1	1	1	1	3	1	2	3	3	2	*
	D	1	NA	1	NA	NA	1	NA	NA	NA	NA	NA	NA	NA	1
	E	3	3	5	3	4	3	3	3	3	-	3	3	3	3
	F	3	3	5	1	3	1	3	1	3	-	3	3	2	4
	G	3	3	4	2	2	2	2	3	2	-	3	3	3	3
	H	3	4	4	3	3	3	3	2	2	-	1	1	1	3
	I	3	3	4	3	3	3	2	2	2	-	1	1	1	3
	J	1	1	3	1	1	1	1	1	1	-	1	1	1	1

Structure / exhibit

- 1 O'Keefe mansion
- 2 Greenhow museum
- 3 North Okanagan Model Railway Association exhibit (upper floor of Greenhow museum building)
- 4 Meat and Dairy house
- 5 Chinese cooks' house
- 6 O'Keefe log house
- 7 General store / post office
- 8 Blacksmith shop
- 9 St. Ann's church
- 10 Cemetery
- 11 Buggy shed
- 12 Red shed - tool display
- 13 Implement sheds
- 14 Schubert house

Criteria

- A Communication of themes
- B Legibility
- C Access - main level
- D Access - upper level
- E Design / construction
- F Physical condition
- G Media appropriate to subject and setting
- H Message > factual info.
- I Appropriate to children
- J Interactive / partic.

Rating scale

- 1 Poor
- 2 Below average
- 3 Average
- 4 Above average
- 5 Excellent

- No interpretation  
 \* Work in progress  
 NA Not applicable

FIGURE 3-3 summarizes the results of the evaluation of non-personal interpretation offered at O'Keefe Ranch.

In order to fit the summary table on one page, it was necessary to code the structures and exhibits numerically and the criteria alphabetically. By incorporating the results of 14 evaluations on one table it is easy to see the relative strengths and weaknesses of non-personal interpretation at the Ranch.

### **Evaluation Results**

The Greenhow museum and the North Okanagan Model Railway Association (NOMRA) exhibit rated above average on communication of Ranch themes and on the presentation of interpretive messages which are more than simply factual information.

In the museum, graphic and written interpretation accompanying thoughtfully presented exhibits conveys the spirit of the pioneer lifestyle from the rough and tumble work of the ranch hands to the more genteel social and family life of the O'Keefes and Greenhows.

The NOMRA was provided space in the upper floor of the Greenhow building to develop a large model representing the Shuswap and Okanagan Railway. Visitors can set the train in motion with the press of a button. This degree of interaction, though modest, is greater than that which is offered through any other non-personal interpretation at the Ranch. The strength of the NOMRA exhibit is largely its outstanding level of design and craftsmanship and its appeal to both young and old. However, there exists little graphic and written interpretation to provide further information on what the model represents.

Non-personal interpretation is directed primarily towards the adult audience. Although the Ranch has an excellent program for school groups of various ages, none of the associated interpretive materials are made available to families visiting the site. Children's interpretive materials, such as activity sheets utilized in the school program, could be distributed to families as they enter the site. Interpretation which is fun and stimulates the child's natural curiosity could also get parents involved as they share in the interpretive experience.

Below average ratings for interpretive message (Criterion H) and communication of Ranch themes were assigned to the blacksmith shop, St. Ann's church, buggy shed, red shed - tool display and implement sheds. Many artifacts within these exhibits have identification labels but there is little or no indication of when, how or why the objects were used. St. Ann's church, which is one of the most significant historic buildings in the region, is a wonderful opportunity for interpretation of regional settlement and the role of the church in the lives of both the white settlers and the native population. The interpretive potential of St. Ann's church and cemetery is greatly under-utilized at present.

The interpretive media of all structures/exhibits evaluated was deemed to be of adequate design and construction. In many cases, however, the physical condition of both indoor and outdoor signs has deteriorated substantially. Several outdoor signs have been removed over the years as weathering has rendered them illegible.

The location of interpretive media was judged to be inappropriate in the case of the meat and dairy house, Chinese cooks' house, O'Keefe log house, General Store/post office and St. Ann's church. This was due to the fact that most of the small interpretive signs are situated indoors in areas inaccessible to handicapped visitors. The exception is the meat and dairy house



which displays a small sign outside but too high up to be easily read by a child or wheelchair bound person.

Because of the nature of their construction and their historical significance, the upper floors of heritage structures at O'Keefe Ranch are inaccessible to wheelchairs and are likely to remain so. In addition, wheelchairs cannot gain admittance to view the main level of the meat and dairy house, Chinese cooks' house, O'Keefe log house, General Store/post office or St. Ann's church. It may be possible to design ramps and/or viewing platforms which would provide handicapped visitors with the opportunity to see the inside of some of these structures. Costs of design and construction could be reduced with the help of volunteer and/or grant supported labour and donated materials. The Schubert house which is currently undergoing renovations, could incorporate main floor handicapped access without a great degree of difficulty.

The legibility problem pertaining to the meat and dairy house has been noted above. Small print and/or poorly situated signs could also present a problem to visually impaired visitors at the O'Keefe mansion and buggy shed. Small signs posted upstairs in the O'Keefe mansion convey an effective message but could be improved with slightly larger text. Those signs located in the buggy shed function mainly as artifact identification. While most identification labels are well placed, a few are situated too far from the viewer to be easily read. These problems are relatively minor in nature and would not be difficult to rectify.

Because indoor signs do not need to be as durable as those situated outdoors, replacement signs for the O'Keefe mansion, buggy shed as well as the red shed - tool display and blacksmith's shop would be relatively inexpensive to develop and install.

To summarize, the visitors' experience at Historic O'Keefe Ranch could be significantly enhanced with improvements to the non-personal interpretive program. Presently, non-personal interpretation at the site consists largely of small signs located inside and outside several buildings. With the exception of interpretation offered in the museum, much non-personal interpretive material has deteriorated from the effects of age and weather. While indoor signs have fared somewhat better than their outdoor counterparts, many are located in areas not accessible to the handicapped.

O'Keefe Ranch offers an excellent program for organized school groups but there is a considerable lack of interpretation available to children visiting the site with friends or family.

### Personal Interpretation Recommendations

The very nature of Historic O'Keefe Ranch suggests numerous activities which visitors could participate in. The literature on interpretation refers to participation (Criterion J), as a key ingredient which "is of the utmost importance in enlivening the visitor's sense of, and feeling for, the past in natural and human history."<sup>16</sup> This appears to hold true in the "real world" of heritage interpretation as well.

Results of the 1989 O'Keefe Ranch Visitor Survey indicate that 81% of those people questioned would like to see more "ranch type" activities which visitors could participate in. (See Appendix 1) This type of interpretation is best suited to the personal interpretation program where Ranch personnel can provide explanation, guidance and respond to visitor queries.

Because there is increasing competition for the time and money of potential O'Keefe Ranch visitors, site administrators must endeavour to develop innovative approaches to personal

interpretation which are likely to yield visitor delight. Following are a few examples which may be considered.

It may be possible to incorporate "role-playing" interpreters into the personal interpretation program. This approach, where interpreters take on the character of actual or fictional historical figures has been successfully used at Barkerville. However, whereas Barkerville represents an 1870s gold rush town with few intrusions from the modern era, O'Keefe Ranch includes buildings, artifacts and equipment from the 1870s to contemporary times and is situated next to a busy highway. In addition, there are numerous living descendents of the O'Keefe family who may take offence with the idea of interpreters attempting to play the part of their ancestors.

With these factors in mind, interpreters could take on the roles of fictional characters such as an old-time cowboy, a maid, the children's nanny, a school teacher or a friend of the family. These characters could mingle with the visitors, initiate conversation, chat about the way things were, conduct demonstrations of various ranching and domestic activities and where possible encourage visitor involvement. For example, visitors could be offered the opportunity to tour the site on horseback led by the old-time cowboy.

As noted in the previous chapter, special events are an excellent way of creating and maintaining interest in the site. In addition to those discussed in Chapter Two, Ranch administrators may consider the possibility of offering smaller scale events on a regularly scheduled basis. For example, cutting horse and roping demonstrations may be offered on Mondays, Tuesdays could present sheep shearing, wool preparation, spinning and weaving, Wednesdays may be devoted to traditional methods of woodworking and/or saddlemaking and so on.

Given economic realities, Ranch administrators must consider utilizing volunteers to augment their interpretive staff. While volunteers can help an organization to keep expenses down, some degree of investment is necessary for recruitment, training, motivation and supervision of unpaid personnel, but this is considerably lower than hiring full or part-time personnel.

Periodic evaluation and improvement of the personal interpretation program is essential if Historic O'Keefe Ranch administrators intend to offer a visitor experience which rivals or surpasses that of its competitors.

### **Non-personal Interpretation Recommendations**

Non-personal interpretation with a strong interactive/participatory quality, is often of the high tech variety, such as visitor activated computer programs and other electronic gadgets. The North Okanagan Model Railway Association exhibit with its visitor activated model train is about as high tech as the Ranch can presently afford to get. Cost of this exhibit to the Ranch is minimal as NOMRA members finance and maintain the exhibit themselves. It would take some creative contemplation to conceive of low tech, affordable, non-personal interpretation which offers visitors the opportunity for interaction or participation with the interpretive media itself and/or with each other.

In developing a strategy to improve the non-personal interpretation program of any open-air museum, it is important to consider the appropriateness of various interpretive media. Program improvements should fit with existing interpretive methods and must be compatible with the organization's budgetary limitations.

Non-personal interpretive media includes materials such as brochures, booklets, post cards, posters, models, signs, maps, drawings, photos, video, film, audio tape and slides. Different media have varying lifespans, production costs and maintenance needs. Often, a high quality interpretive experience may best be obtained by utilizing a combination of media.

In the case of Historic O'Keefe Ranch, an interpretive booklet of sufficient scope and quality will be for sale at the site entrance beginning in May, 1991. Not all visitors will be willing or able to purchase the booklet and it is my belief that some form of non-personal interpretation should be available to all Ranch visitors. The free brochure, currently handed out to visitors could be modified to include more interpretive material, however, the availability of such interpretation could be counterproductive to the sale of booklets. The interpretive media chosen should complement other types of both personal and non-personal interpretation offered at the Ranch.

A variety of non-personal interpretation media are reviewed in this chapter. By considering the pros and cons of various methods in conjunction with the internal and external forces impacting upon Historic O'Keefe Ranch, I have chosen one method which could significantly improve non-personal interpretation at the Ranch. A series of thoughtfully designed interpretive signs erected at appropriate locations on-site would provide visitors with an interpretive offering which they may contemplate at their leisure.

Because signs have little souvenir value, except perhaps in a photograph, their use should not adversely affect the sale of interpretive booklets. Cost is another factor which favours the selection of signs over other media. The costs of production, installation and maintenance of

signs is relatively low compared to the expenses associated with more technically sophisticated methods of interpretation such as slide/tape displays or audio taped messages.

During peak periods, the Ranch's interpretive staff are in high demand. The advantage of signs is that they are available at all times. Interpretive signs can serve the needs of visitors touring the site during busy periods when a "live" interpreter may be unavailable. In addition, some visitors may not want to be part of a scheduled, organized tour and signs can provide a captivating interpretive message for this segment of visitors.

Production and installation of interpretive signs will necessitate some degree of financial investment by Ranch administrators. Nevertheless, high quality materials, careful workmanship and a distinctive yet practical design would have its own rewards. Unlike brochures, signs are easy to read while standing, can be read by more than one person at a time, do not become unmanageable in foul weather and are durable; lasting ten years or more. Tastefully designed signs of moderate dimensions, situated in appropriate locations need not be visually obtrusive.

With printed materials such as signs, brochures etc., the layout and amount of text are critical factors. Too much text can be overwhelming and may discourage the visitor from reading the whole message. The message should be easy to read and understand. Text can be broken up into smaller sections by using headings, subheadings, diagrams, pictures etc. Pictures and diagrams should not, however, be used gratuitously.

Use illustrations for genuinely interpretational purposes ... don't illustrate unless it will help the visitor's understanding.<sup>17</sup>

Having decided upon signs as an appropriate media for Historic O'Keefe Ranch, the interpretive planner must consider the scope and content of the message which will be conveyed

to the visitor. The non-personal interpretation offered by a series of signs located about the site should not try to be all things to all people.

While interpretive signs may not be the most appropriate media with which to stimulate visitor participation and interaction, their message must nevertheless attempt to generate an understanding of the structure, object or natural feature. This can be accomplished in several ways. For example, the interpretation may include an explanation of what the feature is, how it was used, how it was made or how it works. Visitors are often interested in knowing the human history of a place - who built it, who lived there, when was it used, by whom and why. Commenting on the inter-relationship between the feature and some other entity can provide the context which contributes to an appreciation of the object's or site's significance.<sup>18</sup>

For example;

The transportation pattern controlled the sites and development of Kelowna and Penticton ... The packing houses were all built for access to the railway or the ships.<sup>19</sup>

A successful interpretive program need not consist of an extensive multi-media offering which attempts to entertain, educate and accommodate the needs of all visitors. What is important to those involved in the management of open-air museums is a basic understanding of what interpretation is, how it can enhance the visitor's experience and how, by creating a more desirable and competitive "product", it can help to assure the museum's survival.

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15. Op. Cit. Smith, p.25.
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17. Andrew Pierssene, MA, Interpretive Consultant, "Planning, Scripting and Siting Panels," Environmental Interpretation, The Bulletin of the Centre for Environmental Interpretation, Manchester Polytechnic, Manchester, England, June 1985, p.10.



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## CONCLUSION

Heritage resources provide us with tangible reminders of our origins as individuals, as a community, an ethnic group or a nation. Through the preservation and interpretation of these resources we are able to gain a better understanding of how our society - be it local, regional, national or global - came to be what it is today. A knowledge of the triumphs and defeats, the positive and negative results of past endeavors can enable us to make informed decisions concerning our future.

A vast array of these heritage resources are housed in open-air museums located around the world. The range of open-air museums is as diverse as the regions or industries they represent. The site of the open-air museum may have historic significance in itself (i.e. Historic O'Keefe Ranch) or may consist of a collection of buildings and artifacts brought together from several locations (i.e. Ukrainian Cultural Heritage Village located east of Edmonton, Alberta). Regardless of the nature of the site, the irreplaceable resources housed therein demand the highest level of care and conservation which can be realistically afforded by the site's administration.

The underlying purpose of any history museum is to preserve the heritage which has been entrusted to its care for present and succeeding generations. It could therefore be surmised that museums must be oriented towards both the resource and the public for which the resource is preserved. After all, museums do not collect and preserve heritage resources to be stored away purely for the purposes of scholarly research.

Open-air museums provide a unique opportunity to see, hear, touch, smell and even taste elements of our own heritage and the heritage of others. Visiting an open-air museum should be both enjoyable and thought-provoking. The atmosphere is relaxed, informal, and the visitor's

experience at the open-air museum may be unlike any other he/she will ever have. Open-air museums which represent the industry, settlement and development of an area, may contribute to the local resident's perception of his/her community's identity. The combination of recreation, education and the chance to become familiar with the people and history of a particular area has placed open-air museums high on many tourist's "things to see" list. With the popularity of open-air museums and recent growth in the tourism industry it is imperative that a balance be struck between the requirements of effective preservation and the needs of the visitor.

Considering the importance of heritage resources to us both as individuals and collectively, it is essential that open-air museum administrators understand how to manage these resources effectively. Planning, marketing and interpretation are three fundamental aspects of open-air museum management. These three components can work together to ensure the protection of heritage resources while making them accessible, comprehensible and relevant to the enjoyment and education of open-air museum visitors.

Planning is a cyclical process which directs the open-air museum administrators' attention both inward and outward, forward and backward. Inwardly, administrators must review or establish their organization's mission and objectives and they must evaluate the scope and quality of all resources available to their organization. Outwardly, the nature of the organization's competitors and collaborators should be assessed along with any political and economic forces which may have an impact upon the open-air museum. An open-air museum's administrators must look forward and visualize the desired future of the organization while preparing for a range of potential circumstances. Looking back, administrators can evaluate the consequences of past decisions.

While planning is generally accepted as a fundamental part of open-air museum management, marketing may be somewhat misunderstood by museum administrators. However, a sensitive yet creative approach to marketing can impart many benefits to the open-air museum. Open-air museums must compete for the visitor's money, time and attention with innumerable other attractions and activities. Given this reality, marketing has become virtually essential to the economic survival of many open-air museums. A variety of market research methods ranging from unobtrusive observation to professionally developed questionnaires can be employed to gain an understanding of the characteristics of the open-air museum's visitors. Identifying the market segments which have strong visitation potential can enable the open-air museum to utilize their limited marketing budget in a productive manner. Information about the visitor can assist in the development of an enjoyable, provocative and competitive museum "product".

The open-air museum's product can be thought of as everything which the visitor encounters at the site from the moment of arrival to the moment of departure. Interpretation plays a vital role in the provision of a satisfying, memorable visitor experience. The range of interpretation methods is extensive and the open-air museum's administration should consider a variety of techniques, both personal and non-personal, to reach the audience. Different visitors have different needs and preferences when it comes to interpretation and this fact should not be ignored.

The cost of implementing interpretive program improvements would vary depending on the scope and nature of preferred actions, use of volunteers, hired interpreters, media, materials and so on. Before committing to a particular strategy, the interpretive planner should investigate the feasibility of alternative methods of delivering the program. Experienced, trained interpreters

will demand higher wages than high school or college students chosen to fill similar positions. The utilization of volunteers as interpreters is an excellent way to encourage community involvement and keep operational expenses down.

The number and nature of the interpretive staff are only two of the variables affecting the feasibility of the interpretive program. the need for additional supervisory staff, training, costumes, props and other support materials and facilities must also be considered. Naturally, implementation of the intended program improvements can not proceed without having secured the necessary funding.

Once an interpretive program has been developed, it should be monitored to ensure that the "modes and messages" work together to provide an enjoyable, educational and captivating leisure experience.

While there are many facets of open-air museum management which have not been explored in this document, planning, marketing and interpretation are three of the most important. The overall strategic planning process establishes direction and identifies the key issues which ongoing "second level" planning must address. Marketing and interpretation, two issues of vital importance to the open-air museum, are not entirely independent. They work together to achieve organizational objectives by identifying and attracting visitors to the site and subsequently engaging their attention with a distinctive "product." A site which can provide visitors with top quality service and a memorable interpretive experience will develop a first-rate reputation, putting it on the road to greater financial security. A strong financial footing is essential to the continued success of the open-air museum and ultimate survival of its irreplaceable collections. Planning is the essential component which overrides all other facets of open-air museum

management. An ongoing, pro-active approach to planning can help the open-air museum to achieve and maintain a level of excellence over the long term.

## APPENDIX ONE

### HISTORIC O'KEEFE RANCH VISITOR SURVEY 1989

#### 1. PLACE OF ORIGIN:

- North Okanagan	12%
- South Okanagan	07%
- Lower Mainland	16%
- Vancouver Island	04%
- Other B.C.	16%
- Alberta	17%
- Other Canada	08%
- Washington	05%
- Other USA	05%
- Europe	11%
- Japan	-
- Other	01%

TOTAL SAMPLE 462

#### 2. REASON FOR VISITING THE NORTH OKANAGAN:

- To visit O'Keefe Ranch	20%
- To visit friends/relatives	29%
- Vacation	41%
- Business	02%
- Passing through	04%
- Other	03%
- Multi purpose	01%
- Resident	01%

TOTAL SAMPLE 428

#### 3. HOW ARE YOU TRAVELLING?

- Automobile	81%
- Bus	02%
- R.V.	14%
- Bicycle	-
- Other	02%

TOTAL SAMPLE 427

## 4. TYPE OF LODGING IN NORTH OKANAGAN:

- Motel/hotel	31%
- Bed & breakfast	01%
- Campground	22%
- Friends/relatives	25%
- At home	17%
- Other	01%

TOTAL SAMPLE	428
--------------	-----

## 5. ARE YOU PART OF AN ESCORTED TOUR?

- Yes	04%
- No	96%

TOTAL SAMPLE	422
--------------	-----

## 6. DURATION OF TOTAL TRIP:

- Day visit	18%
- 1-2 days	03%
- 3-7 days	28%
- 8-14 days	24%
- 15 days or more	26%

TOTAL SAMPLE	419
--------------	-----

## 7. NUMBER IN PARTY:

- Seniors	22%
- Adults	55%
- Students	08%
- Children	10%
- Under 6	05%

TOTAL SAMPLE	1819
--------------	------



## 8. FAMILY INCOME IN 1988

## CANADIAN:

- Under \$20 000	09%
- \$20 000 - 39 999	30%
- \$40 000 - 59 999	21%
- \$60 000 or over	18%
- Don't know	13%

## U.S.:

- under \$15 000	01%
- \$15 000 - 29 999	03%
- \$30 000 - 44 999	02%
- \$45 000 or over	03%
- Don't know	-

TOTAL SAMPLE	303
--------------	-----

## 9. HOW MUCH TIME DID YOU SPEND AT O'KEEFE RANCH?

- Less than an hour	02%
- 1-2 hours	40%
- 2-3 hours	41%
- Up to half a day	15%
- Up to a whole day	02%
- More than a day	-

TOTAL SAMPLE	429
--------------	-----

## 10. IF YOU HAD KNOWN MORE ABOUT THIS SITE BEFORE YOUR VISIT, DO YOU THINK YOU WOULD HAVE PLANNED TO SPEND:

- More time here	15%
- About the same	84%
- less time here	01%

TOTAL SAMPLE	423
--------------	-----

## 11. HOW DID YOU LEARN ABOUT O'KEEFE RANCH?

- Local friends/relatives	20%
- Friends/relatives outside area	05%
- Driving by	30%
- Brochure	17%
- Travel Info Centre	02%
- Radio, newspaper, TV	02%
- Part of escorted tour	01%
- Always knew about it	15%
- Don't remember	03%
- Other	06%

TOTAL SAMPLE	420
--------------	-----

## 12. HAVE YOU VISITED O'KEEFE RANCH BEFORE?

- Yes	29%
- No	71%

TOTAL SAMPLE	421
--------------	-----

## 13. NUMBER OF PAST VISITS:

- 1-2	71%
- 3-4	14%
- 5 or more	14%

TOTAL SAMPLE	119
--------------	-----

## 14. TIME OF MOST RECENT VISIT:

- Within 1989	13%
- Within 1988	11%
- Within past 5 years	31%
- More than 5 years ago	45%

TOTAL SAMPLE	118
--------------	-----

## 15. WOULD YOU LIKE TO VISIT AGAIN?

- |         |     |
|---------|-----|
| - Yes   | 60% |
| - No    | 11% |
| - Maybe | 29% |

TOTAL SAMPLE	413
--------------	-----

## 16. WAS THE ADMISSION PRICE:

- |            |     |
|------------|-----|
| - Fair     | 92% |
| - Too high | 07% |
| - Too low  | 01% |

TOTAL SAMPLE	416
--------------	-----

## 17. HOW IMPORTANT IS AUTHENTICITY OF DISPLAYS, BUILDINGS, ACTIVITIES, ETC. TO YOUR ENJOYMENT OF THIS SITE?

- |                        |     |
|------------------------|-----|
| - Very important       | 84% |
| - Fairly important     | 13% |
| - Not very important   | 02% |
| - Not at all important | -   |

TOTAL SAMPLE	419
--------------	-----

## 18. HOW WOULD YOU RATE DISPLAY QUALITY?

- |             |     |
|-------------|-----|
| - Excellent | 46% |
| - Very good | 51% |
| - Average   | 03% |

TOTAL SAMPLE	417
--------------	-----

## 19. HOW WOULD YOU RATE STAFF FRIENDLINESS?

- |             |     |
|-------------|-----|
| - Excellent | 52% |
| - Very good | 45% |
| - Average   | 02% |
| - Poor      | -   |

TOTAL SAMPLE	418
--------------	-----

20. WOULD YOU LIKE TO SEE MORE "RANCH TYPE" ACTIVITIES WHICH VISITORS COULD PARTICIPATE IN SUCH AS HORSEBACK RIDING, MILKING, ETC.

- Yes	81%
- No	19%

TOTAL SAMPLE	399
--------------	-----

21. WOULD IT BE A GOOD IDEA FOR O'KEEFE RANCH TO HAVE ACCOMMODATION SUCH AS:

BED & BREAKFAST

- Yes	48%
- No	52%

CAMPGROUND

- Yes	45%
- No	55%

TOTAL SAMPLE	376
--------------	-----

22. WOULD YOU LIKE TO SEE MORE HISTORIC BUILDINGS MOVED TO THE SITE?

- Yes	65%
- No	35%

TOTAL SAMPLE	405
--------------	-----

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