

SHARED STEWARDSHIP: A TOOLKIT FOR SUCCESSFUL PARTNERSHIPS AT HISTORIC SITES



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1. Introduction

The National Trust for Canada regularly receives inquiries from owners, operators and community groups who are grappling with decisions about the stewardship of the historic sites under care of multiple partners. At the heart of the issue, is how to navigate and continuously refresh these partnerships to best support a historic site's long-term stewardship.

Over the winter of 2021, the Trust undertook a research project to better understand the challenges facing these sites and learn how partners are working together to resolve them. The research included a national survey and over 40 interviews with owners, operators, and community partners. *Better Together: A Research Report on Partnerships at Historic Sites* (available at <https://regenerationworks.ca/research-reports>) presents the methodology and results of the research, and this *Shared Stewardship* Toolkit presents recommendations in a format that will be useful for all partners.

The research focused primarily on historic sites whose history is being actively interpreted for the public, and that are owned by public agencies. The Trust recognizes that those responsible for other types of historic places are also facing challenges, but the specific nature of actively interpreted historic sites has key implications for the relationship between partners.

The main conclusion of the Trust's research is that very few sites can rely on a single entity to ensure its stewardship because no one group has all the necessary mandates, resources and competencies required for success. Partnerships have emerged as being critical to the stewardship of these sites – where “success” is measured by their ongoing community relevance, protection of heritage features, and financial sustainability. But with partnerships come challenges, and the best practices for establishing and maintaining these partnerships are not widely shared or understood.

The *Shared Stewardship* Toolkit is structured around the main topics that our research revealed as the key challenges for historic site partnerships.

ABOUT THE NATIONAL TRUST

The National Trust is Canada's national charitable not-for-profit organization that leads and inspires action for places that matter.

We love historic places and we love people too. We love landmarks that tell our collective story, and our work is equally essential for struggling downtowns, remote regions, and diverse communities. We know historic places are the cornerstone of a vibrant and sustainable future. We offer proven tools to save and renew historic places, and a treasure trove of destinations to visit and discover.

Introduction

Section 2 introduces the different types of Places, Players, and Partnerships involved in historic site stewardship. The typologies of geography and physical complexity are defined, as are the various types of owners, operators, and third parties. Typical partnerships are explored in the context of shared stewardship with consideration of alternative and emerging approaches.

Section 3 presents the best practices that partners can implement in responding to the challenges they face. Each thematic topic outlines those challenges under the heading 'What We Heard', presents the best practices being applied by owners, operators and third-party partners, and offers links to relevant resources. Section 4 presents case studies that illustrate how best practices are in use at specific historic sites from across the country.

While focused on historic sites where the primary activity is the interpretation of the site's history, the principles and specific recommendations contained in this Toolkit are applicable to a broader range of historic places, including those that house non-profit organizations, operate social enterprises or house cultural or social services. This Toolkit also complements the other resources on the Trust's Regeneration Works website, including the Marketing and Endangered Places Toolkits, and tip sheets and case studies on fundraising, revenue generation, place of faith revitalization, and more.

Acknowledgements

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Canada

2. Definitions: The Players, Places, and Partnerships

The Places

Geographic location and physical complexity have a significant impact on the ways that sites are governed and operated. While there are universal issues and best practices to be shared across all sites, the specifics of location and site size determine certain dynamics in the shared stewardship dynamic that should be considered. Solutions must be customized to meet the needs of the individual site.

Geography

Remote sites: Location results in lower visitation, therefore focus is less on visitor experience but on meaningful community engagement. Communication and relationships with community members is often more easily facilitated due to proximity in daily life.

Rural sites: Present unique challenges in capacity for growth, often with fewer resources. Community engagement often more easily facilitated, though there can be challenges in recruiting staff/volunteers over time. A rural site may serve many purposes for its community (place of gathering, food and beverage services, parklands) and must be flexible for this.

Urban sites: Urban density means dealing with higher volumes of visitors, and greater strains on daily operations/maintenance. There are typically more partnerships/players involved in one site and the forces of development place strains on third party relationships due to the need for advocacy regarding encroachments on landscapes that may be defining site features

Typologies

Large/Complex: Sites that are large in size or have attached features such as parkland add layers of complexity to the partnership, introducing more players into the conversation and more challenges to deal with, particularly in terms of public access, liabilities, and maintenance. Not necessarily a negative trait and can “open more doors” in terms of growth and partnerships.

Small/Medium: More straightforward in terms of management but present own set of challenges in terms of scaling operations to the needs of the community while remaining relevant.

2. Definitions: The Places, Players and Partnerships

The Players

An understanding of perspective is necessary to reading and applying the toolkit findings. The differences between owners, operators, and third parties must be considered in understanding their unique interests, needs, and structures that shape their approach to stewarding each site. While it is important to understand the full range of stewardship roles, recommendations contained in the Toolkit reflect a research focus primarily on publicly owned sites with an interpretive mandate.

Owner

As the holder of legal title, the owner is ultimately responsible for the long-term stewardship of a historic site. Based on their own mandate and their response to the value placed on the site by the community, the owner also determines the extent to which the site's history is actively interpreted. Ownership can occur in many ways, such as acquisition, bequests, donation, and expropriation. Who owns a site (and why) has a determining factor on how a site is managed.

Government ownership is the most common model for historic sites open to the public with both an interpretive and non-interpretive focus. Whether federal, provincial/territorial, or municipal, governments are usually the best positioned with access to necessary resources to be stewards of historic sites, but may not be closely or directly connect to the community they serve.

Non-profit ownership of historic sites often occurs when community members rally to save an endangered place and tell its story. For non-profit owners whose mandate does not include interpretation, the historic qualities of a site may be important to their identity or brand, such as places of faith. There are also instances where non-profits assume ownership of historic properties for reasons unrelated to cultural heritage, as in land trusts focused on ownership in perpetuity for reasons such as nature conservation or protection of community assets.

Commercial ownership of historic sites is less frequent than government or non-profit owned and is often seen in the case of tourism operators. While the historic features may be important to their brand, it is most often secondary to commercial interests and limited interpretation of the site's history occurs.

Navigating Changes in Ownership

Over time, a partner's capacity to support a site can change, leading to instabilities in long term sustainability and effective stewardship. Partners should remain open to exploring changes to a partnership if such shifts occur to ensure the historic sites in their care continue to be protected and enjoyed by the public. Such changes might include an operator pursuing ownership, only advisable when appropriate expertise, resources, and sound planning are involved to ensure responsible stewardship. This is not a rationalization for the off-loading of historic sites, or a rash repatriation of operations when difficulties arise, but rather a recognition that successful stewardship relies on each partner fully playing the role they are best positioned to play – and doing so with knowledge of challenges and opportunities that the roles present.

Operator

The term “operator” represents the party who plays a significant role in overseeing day-to-day operations of the site. Owners rely on secondary operators when they do not have the mandate, expertise, or capacity to operate it themselves. In the case of government-owned sites that are physically removed from the owner, it is often a conscious decision to have a local operator that is better positioned to represent community needs and interest. Secondary operators typically have more flexibility and a specific set of skills with which to cultivate the site.

Non-profit organizations are sometimes founded with the sole purpose of serving the operational needs of a site, while others are selected as operating partners through a bid process. Historical societies are common operational partners of historic sites. Operators can also include commercial entities who run a site primarily for financial gain.

Third Party

Third parties represent groups that support operations in addition to the primary operator. They can play a range of critical roles for the stewardship of the site, such as fundraising, advocacy, programming or food and beverage services, and work best when focused on specific goals. These roles can be played by volunteer groups, non-profit organizations, or commercial enterprises – each contributing specialized expertise or services. Third parties often represent community interests, offering a direct connection to local citizens. They can also diversify site offerings and draw in new audiences beyond the traditional historic site visitor demographic.

Indigenous Stewardship and Perspectives

Due to the evolving nature of Indigenous historic sites in the current socio-political context, the Toolkit lightly explores best practices in relation to Indigenous perspectives. Many sites are re-examining their relationship with Indigenous heritage, and Indigenous ownership and governance of many cultural sites is in the process of being restored. Emerging models for self-determined Indigenous stewardship offer a glimpse into the future of these sites, of which co-ownership and management is part.

2. Definitions: The Places, Players, and Partnerships

The Partnerships

Partnerships are formed at historic sites when an owner engages an additional party who is better positioned to address operations, or an aspect of operations. Additional parties bring needed expertise or resources that the owner may not have, approaching operations from a local level. There are many variations in the types of partnerships that exist at historic sites and may not be limited to the typical categories contained within. For the purposes of this Toolkit, discussions of partnerships are targeted toward formal operational partnerships and do not explore ad-hoc, informal community or programming-related partnerships.

Owner with Operator: Interpreted Site

As owners of public sites often manage multiple properties and may not have historic management expertise, it is an effective strategy to engage a heritage focused secondary party. In this arrangement, the operator is granted responsibility and autonomy to varying degrees, according to the specific needs of each owner and site. Owners hold authority over property management, while operators run the site according to their own mandate.

Operators often refer to the site owner for funds, capital upkeep and general strategic direction while pursuing interpretation, programming, and site operations on their own. Owners typically provide some financial support for programming and operations, but operators are expected to supplement their budget through fundraising and revenue generation.

Strengths: Allows for experts to manage historic interpretation and activation of the site while the public benefit remains within government control to ensure long term sustainability.

Examples: Oshawa Museum, Huble Homestead, Joy Kogawa House, Beaubears Island

Owner with Operator: Non-Interpreted Site

Encountered at sites that are publicly owned, when a non-profit or commercial group is the primary operator, and the active historic interpretation of the site is limited. In these cases, historic sites serve an alternative use beyond historic preservation such as social development or hospitality.

When a commercial entity acts as the primary operator, they function more independently financially, and animate the space through a specific service rather than interpretive programming. Owners or third parties may address interpretation as a supplementary feature of the site's offerings.

Strengths: Offers a means of animating a historic site through a new lens that may have more relevance to a community's needs and/or continue meaningful use of a site with public benefit.

Examples: Guild Inn Estate, New Dawn Centre for Social Innovation, Easter Seal Camp SaskAbilities

Owner or Owner/Operator with Third Party Community Group(s)

Often seen at large estates, institutional sites such as religious, military, or educational sites, and at park-like historic sites where the public has access to the grounds. Increased public presence in less regulated outdoor areas introduces complexities to maintenance and community use, and third party groups contribute an important additional stewardship presence.

Owners represent public ownership and retain the overarching authority and operation of the site. Partnerships are often in place to enhance the public benefit, including interpretation/programming, commercial concessions such as food services or gift shops, or fundraising for capital improvements. These third parties work collaboratively with the owner and often represent community interests.

Strengths: When well managed can provide multiple avenues for fundraising, deeply involved local communities, and enhanced educational experiences for the public.

Examples: Guild Park, Allan Gardens, Halifax Citadel, The Spire of Sydenham

Owner or Owner/Operator with Third Party Commercial Groups

Third party commercial groups are increasingly being engaged in programming enhancements at historic sites. From Escape Rooms to Axe Throwing and Goat Yoga, the additional variety of offerings that commercial groups bring to the table can make a site a more dynamic place. Typically, third party commercial groups pay a pay per use or pay per attendee rate to the Owner or Operator who is fully operating the site and providing limited access.

Strengths: Diversifies visitor experience while drawing in new audiences and potentially increasing revenue generation.

Examples: Loughheed House, Black Creek Pioneer Village, Diefenbunker

Co-Operated or Co-Owned and Operated

A co-operative model appears in shared use sites typically used for social or arts purposes, where multiple non-profit groups partner to rent a property and reap the economic/community building benefits of sharing resources. Historic sites can be re-envisioned as multi use spaces with a multitude of non-profit and commercial partners as operators. Shared use may not be appropriate for all historic sites, but it can create new opportunities for public engagement.

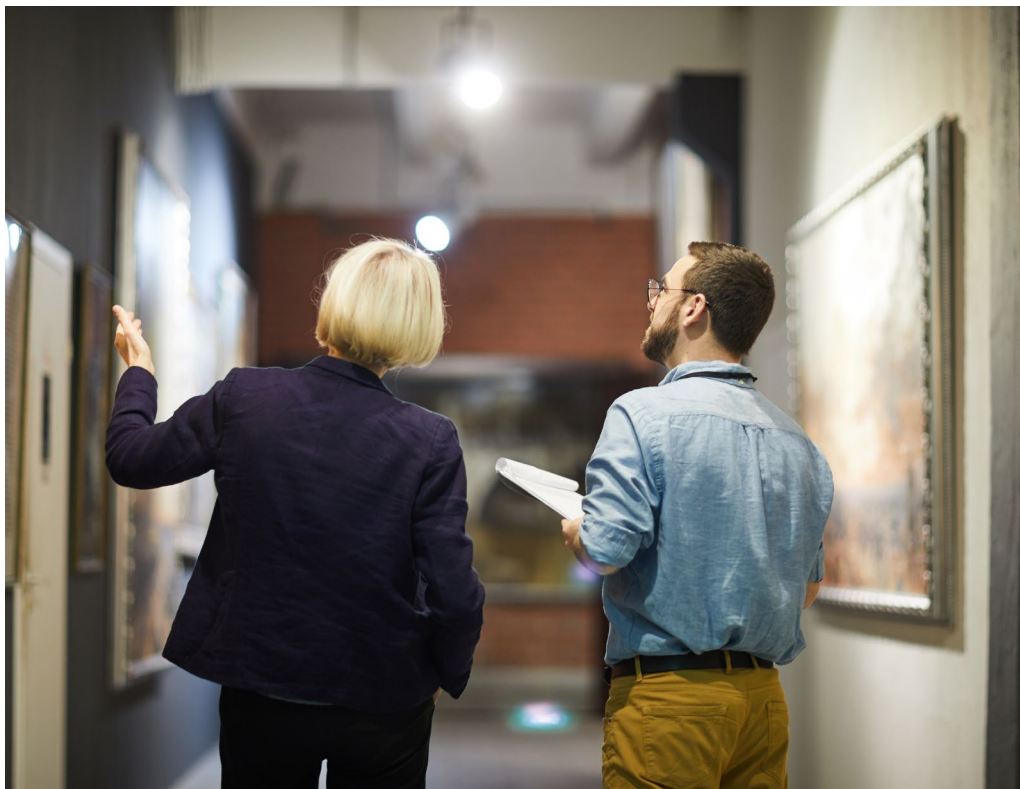
A co-operative structure is appearing increasingly at Indigenous heritage sites, as Canada's definitions of ownership are adjusting throughout the process of Reconciliation. In some cases, a municipality, province/territory, or federal government will maintain ownership of the land and engage in co-operative operations with Indigenous groups. Indigenous voices lead interpretation and ensure appropriate operations and usage of Indigenous cultural sites. A variation of this model is in the co-ownership and operation of a site between a government body and Indigenous group. In either approach, responsibilities of maintenance, planning, interpretation, and more are approached collaboratively, but government commits to contributing a certain amount of funds and support.

Strengths: Expands use of historic sites to benefit multiple parties. Indigenous sites are more effectively cared for when relevant Indigenous groups lead stewardship process, led by needs and interests of community members.

Examples: Arts Habitat Edmonton, Yukon First Nation historic sites, Obadjiwan-Fort Témiscamingue National Historic Site

3. Best Practices

The following Best Practices explore issues and opportunities identified as having a significant impact on the shared stewardship of Canada's historic sites. The most pressing challenges are presented according to theme, accompanied by recommendations for best practices and ideas for further reading. Best practices are offered generally, as well as specifically for owners, operators, and third parties. They should be approached as a whole, to further understanding of each partner's distinct perspective.



PART 1:

Putting the Agreement to Paper

What We're Hearing

A well written agreement is integral to a successful partnership. When an agreement lacks clarity or provides an unrealistic division of roles and responsibilities, issues may arise in all aspects of managing and operating the site. Agreements are often created without appropriate expertise or detailed understanding of operations. In some cases, agreements do not exist at all between owners and operators or third parties, leaving everyone involved vulnerable to liability and instability. There are also instances where an agreement exists, but partners do not understand or respect it. It is crucial to establish mutual understanding from the start and build in mechanisms for review and adjustment over time.

Agreements need to be revisited because partnerships inevitably change over time. Perhaps the initial roles envisioned for the partnership are no longer practical for the site, or the status of the property changes, as in the case of a community group taking on operations to save a building from demolition. Having a formal conversation about the relationship agreement provides a context to explore and accommodate changing needs.

Best Practices

Partnerships are highly unique, shaped by the specific conditions of each site and characteristics of each partner involved. For this reason, it is not possible to provide a standard template for partnership agreements at historic sites. Agreements must be tailored to these unique circumstances every time a new partnership is formed.

The following general best practices can be applied by all parties involved. Agreement writing should consider the principles and recommendations contained elsewhere in the Toolkit, as well.

Length of Term: Agreement periods longer than one year offer greater security in strategic and financial planning, while agreement periods that are too long between renewals can limit evolution and impose outdated mechanisms. Determine a renewal schedule that best suits each party's needs and build that into the agreement.

Negotiation Schedule: Write the agreement collaboratively with appropriate expertise and representation at the table. Developing the agreement may be a lengthy process and should not be rushed. Consider the timelines of the partners with whom you are working and their decision-making process when establishing a negotiation schedule. A partner with a consensus-based process may take longer than a hierarchical structure will.

Level of Detail: Include a statement that reflects the partners' shared vision for the site, which will help establish a direction for long term planning. Sections of the agreement may require different levels of specificity. For example, terms around finances and maintenance should be highly specific while site use and programming can be laid out more broadly, offering freedom for development.

Assigning Roles: Divide roles and responsibilities according to the expertise, skills, and resources of each partner. Doing so will set up a balanced structure with which to move forward. Ensure the agreement reflects an understanding of roles.

Success Indicators and Limits: Build in success indicators to avoid complacency in the implementation of the agreement. It is also crucial to integrate limitations (funding, staff time, etc.) based on realistic expectations of what each partner can offer.

Independence vs Accountability: Integrate measures that ensure owner oversight and accountability on the part of operator or third party, while leaving room for flexibility so that these parties can evolve in their roles.

Best Practices for Owners

- Consider the responsibilities you intend to relegate to the partner – are they realistic? Can you offer support, even if only during a transitional phase? For example, if fundraising is going to be expected of the partner, ask for information about their fundraising history.
- Consider the financial capacity of the operator and whether their resources are limited. How can you accommodate a lean partner, such as keeping rent to be paid by the operator as modest as possible?
- Recognize that there are certain costs the owner must maintain, such building insurance. On the other hand, there are typical costs that owners should expect to cover, as in liability insurance.
- Give operators and third parties necessary control over their working environment, while also establishing parameters to ensure your due diligence as site owner.
- Consider completing a risk assessment as part of the exercise of assigning roles.

- Determine a logical point of contact within your own structure and clearly indicate it within the agreement, so that the lines of communication between partners are clear.

Best Practices for Operators & Third Parties

- Ask questions and do your research! Review your charitable status, bylaws and other foundational documents to ensure this venture is in line with your purpose as an entity. Insist on seeing data that will help you understand what you are taking on. For example, utility bills, tax bills, maintenance records, insurance costs, visitation statistics. Will your role bring unanticipated expenses, such as property tax or liability insurance?
- Don't take on responsibilities that you do not have the expertise or capacity for. When entering into a new agreement, consider whether you have the skill set to manage and deliver on your role effectively.



Learn More

Case Study: Ownership of Multiple Sites: City of Calgary, AB; Regional District of Fraser-Fort George, BC; The Canadian Heritage of Quebec, QC – <https://regenerationworks.ca/4-4-case-study:-ownership-of-multiple-sites/>

Saskatchewan Culture - Partnership Action Plan – <https://www.saskculture.ca/programs/organizational-support/organizational-resources?resource=8&subresource=53>

Park People, Growing Opportunities: Investing in, Revitalizing, and Sustaining Allan Gardens – <https://parkpeople.ca/resources/en/research/588/growing-opportunities-investing-in-revitalizing-and-sustaining-allan-gardens>

Principles for the Governance of the Heritage Conservation Sector in Canada – <https://www.historicplaces.ca/media/10833/governanceforheritage.pdf>

PART 2:

Governing the Site

What We're Hearing

Navigating governance in a partnership is complex. Partners must work together to attain common goals through varying lenses, achieving balance between accountability and independence. Relationships change over time, as do contributions and power dynamics, creating tensions in the partnership. Issues arise when all parties are not engaged in governing the site at appropriate levels, and boards and committees within each party often fall out of alignment and lack clear communication with each other.

Third parties are often undervalued and excluded from necessary conversations about the focus and development of a site, limiting their potential to contribute to the partnership. Government politics have a distinct effect on site management, determining shifts in the level of support directed to operators and third parties.

Best Practices

Find a governance structure that involves all parties in a balanced way that suits the site - every partnership will require fine tuning to determine the best approach. A consensus-based decision-making process may be more suitable than involving a voting board of directors, for example. It is important for each partner to retain their autonomy while engaging with the others in the partnership at an appropriate level. An understanding of roles is key. Overall, effective governance is rooted in a process of acknowledging progress and pointing to what needs to happen to continuously move things forward.

Operators: Try This

Participating in a Cultural Advisory committee that oversees the implementation of an owner's cultural plan, or similar initiatives, can build credibility and demonstrate active engagement with the owner's objectives. Seeking out opportunities to contribute illustrates leadership and can reflect positively on your site. Participating in regional boards or committees also helps you network with your peers and build external relationships.



Best Practices for Owners

- Participate in governance at a level that allows operator and third parties to determine a governance structure that works for them. If you are providing a representative for an operator or third-party board, select an appropriate representative with interest/expertise in the site.
- Including governance “must haves” in the partnership agreement will ensure accountability on the operator’s part.
- Respect the advocacy role of many operators and third parties. They have a duty to speak up for community issues.

Best Practices for Operators/Third Parties

- For non-profits, having a strong, active board with a diversity of expertise, perspectives, and community ties demonstrates responsible oversight. This signals to the owner that the site is in good hands.
- Feedback is mixed on the impacts of owner participation in board structures: some find it a benefit to partner communication, while others find it restrictive to open discussion. If you do invite the owner to sit in, clearly state the limits of their role in your agreement or invite them to participate in working groups/committees instead.



Learn More

Case Study: Ownership of Multiple Sites: City of Calgary, AB; Regional District of Fraser-Fort George, BC; The Canadian Heritage of Quebec, QC — <https://regenerationworks.ca/4-4-case-study-ownership-of-multiple-sites/>

Saskatchewan Culture, Good Governance Resources — <https://www.saskculture.ca/programs/organizational-support/organizational-resources?resource=1>

Park People - Park Governance: A Close Look at Montreal’s Mount Royal Park, a Collaborative Relationship Between Les Amis de La Montagne and the City of Montreal — <https://parkpeople.ca/resources/en/case-study/3067/park-governance-a-close-look-at-montreals-mount-royal-park-a-collaborative-partnership-between-les-amis-de-la-montagne-and-the-city-of-montreal>

PART 3: Defining a Shared Vision

What We're Hearing

Directing a historic site with multiple partners requires coordination of each party's vision, drawing on shared resources to support development over time. Planning presents a range of issues, particularly in the envisioning of shared goals and objectives for the site's future that are clearly defined. Plans are often developed without consultation or consideration of each others' goals, and the community context, more broadly. Whether in the creation of long-term strategic plans or short-term goals, conflicts arise when there are too many "cooks" in the kitchen - leading to lack of action, delayed progress, and organizational fatigue.

Best Practices

Planning requires collaboration to varying degrees. Allow those with responsibility for an area to lead its planning process, supported by input from other parties, as necessary. The vision statement included in the agreement should direct subsequent planning for the site, so be sure to revisit that statement and use it to guide collective planning efforts. Participate in visioning activities when invited ensure your voice and needs are addressed down the line.

Operators & Third Parties: Try This

Aligning your plans with the owner's priorities is a strategic way to enhance the value of the site. By making clear, documented connections between your work and the owner's objectives, you can demonstrate how the site is contributing to fulfilling the owner's goals in the community. If your site is government owned, maintain an awareness of shifting political priorities and integrate them into your planning.

Example: A municipal owner's Cultural Plan is updated to include goal setting around climate change and sustainability - how can you reflect this in your planning? Through programming goals, or operational changes?



Best Practices For Owners

- Involve operators and third parties and collaborate to achieve shared and parallel goals. Their programs and initiatives may already be contributing to your objectives in unexpected ways.
- Allow operators/third parties the flexibility required to plan around their needs. Offer your support if you have the appropriate expertise.
- When plans are submitted for your review and/or approval, provide meaningful feedback and suggestions for future development.

Best Practices for Operators/Third Parties

- Participate actively in the site owner's planning process, when possible. If they do not currently consult you when developing plans that may impact your site – ask to! Open up a clear conversation about your future goals.
- Keep the owner in the loop about your future plans. Owners at a government level often have access to funding that non-profits do not.
- Engage the community in your planning initiatives. The more your site reflects the needs of the community, the more value added to your site in the eyes of the owner.
- Think outside the box – how can your site extend beyond the heritage sector? Realizing untapped connections to economic development, tourism, or social justice initiatives, for example, can diversify your community contributions, and be leveraged to increase support for your site.



Learn More

Case Study: Clear Roles and Shared Objectives: The Glenhyrst Art Gallery – <https://regenerationworks.ca/4-1-case-study-clear-roles-and-shared-objectives/>

Case Study: The Benefits of Third Parties: Halifax Citadel – <http://regenerationworks.ca/4-2-case-study-the-benefits-of-third-parties/>

Managing Historic Places: Protection and Stewardship of Your Local Heritage – <https://open.alberta.ca/dataset/cc425c76-ca13-48a4-a46d-7957bd085250/resource/62c1e271-05e7-434f-acea-560352ba9fd6/download/7029261-2010-Managing-Historic-Places-Protection-Stewardship-Your-Local-Heritage.pdf>

What is Community Engagement – https://connectculturalconsulting.ca/wp-content/uploads/2017/04/smt_matelic.pdf

Hawthorne Cottage Management Plan – <https://www.pc.gc.ca/en/lhn-nhs/nl/hawthorne/info/plan>

Government of Yukon/Yukon First Nations Heritage Planning – <https://www.yukonheritage.com/heritage-plans>

PART 4:

Navigating Funding and Generating Revenue

What We're Hearing

Raising funds and earning revenue is a consistent issue, as partners are often challenged by the shared responsibility of establishing financial growth and sustainability. Operators report a lack of consistent operating funding and support to operate at a dynamic level. Owners describe having overstretched financial resources spread across multiple sites. There are also third parties, contributing significant amounts of funds to operations without a formal voice in site management.

Issues arise when there is a lack of revenue generation or fundraising expertise within the operating and supporting third parties. While heritage focused organizations and community groups bring passion and activism, they are often challenged by the realities of running a business. Government owned sites often navigate fundraising limitations to due public perceptions and limited eligibility for grants. Efforts to sustain a site financially can distract from preserving the site.

Best Practices

Development of a viable, sustainable financial strategy is integral to the success of a historic site and should involve balanced contributions among all parties. Contributions can be monetary or in kind and should reflect a respect for each party's resources and understanding of support vs overdependency. Differences between partners present unique opportunities – the involvement of multiple parties offers more diverse funding sources to tap into.

Best Practices for Third Parties

- Be transparent in your role and whether it draws on or contributes to site finances.
- If you are serving a fundraising role, be sure to integrate your efforts and fundraising strategy with the operator and their plans – work together to communicate a clear, unified message that garners support.

Owners and Operators: Try This

Consider introducing a third party to the partnership to support fundraising. Third party community groups can often access funding not available to governments or government affiliated organizations. Community groups typically represent the interests of the local community and may have more success reaching those with funds to share. Keep in mind that this is not a “quick fix”, as fundraising requires a coordinated effort among all partners. Including third parties is about leveraging financial resources in the community.



Best Practices for Owners

- Government funding must come with oversight and accountability to ensure appropriate management of public money, but the level of oversight should relate to funds and not extend to excessive micromanaging in other areas.
- Owners and third parties should be compensated for the valuable work they do, but not be reliant on owners for survival. It is your role to support your partners so that they can flourish and develop operational sustainability
- Be realistic in your expectations of what operators can accomplish with the financial resources you are providing. In many cases, operational funding barely covers the bills and staffing costs. Every site is unique in their ability to fundraise and pursue revenue generation – some may be limited by physical barriers such as lack of event space.
- If you provide operational funding, try to do so on a multi-year basis as it is challenging to plan beyond one year otherwise.
- Consider inflation rates in the funding you provide each year!
- Are you limited or unable to provide operating funding? Perhaps you can offer in-kind support instead - think IT services or strategic planning support.
- Can you offer other types of grants in addition to or in place of operating funding? For programming? Capital upgrades? Or you could establish an annual contribution to a capital fund for future projects.

Best Practices for Operators

- A lack of diverse revenue streams and overreliance on funding from the site owner creates financial instability. Try to pursue a balance of funding streams through self generated revenue, fundraising, and grants. Greater financial independence can create more flexibility in your partnership.
- Be responsible, but creative in exploring revenue generating strategies that extend beyond the typical “heritage” model, as in the case of sites taking a social enterprise approach.
- Understand the funding opportunities available to you and take advantage of them. It is up to you to do the work of keeping yourself up to date with funding avenues.
- Address funding inefficiencies clearly and directly to the site owner - but understand the funding context: you may be one site in a network of sites with similar needs.
- If public perceptions of the site as being government owned are impacting fundraising efforts, work to distinguish yourself from the owner through clear signage, promotion, and messaging to potential donors, funders and sponsors.
- Ensure that you understand how your fundraising efforts will contribute to the bottom line. Does your fundraising reduce the amount that the owner contributes or add additional capacity?



Learn More

Case Study: Entrepreneurial Spirit and Innovative Storytelling: Loughheed House — <https://regenerationworks.ca/4-3-case-study:-entrepreneurial-spirit-and-innovative-storytelling>

Case Study: Clear Roles and Shared Objectives: The Glenhyrst Art Gallery — <https://regenerationworks.ca/4-1-case-study:-clear-roles-and-shared-objectives/>

Partnerships Between Not-for-Profit Organizations and Business — <https://carleton.ca/3ci/wp-content/uploads/R-14-O2.pdf>

Friends in High Places: Navigating Friends of Partnerships — <https://www.thc.texas.gov/blog/friends-high-places-navigating-friends-group-partnerships>

PART 5: Caring for the Site

What We're Hearing

Historic sites require a specialized system of care that draws on shared resources and individual strengths. The complexities of such create issues in building and site maintenance, as partners find it difficult to translate roles and responsibilities from the agreement into the realities of day-to-day operations. Maintenance priorities are a point of contention among owners and operators, as owners take an asset management approach that contrasts with the preservation focused lens of many operators.

Publicly owned sites are often a low priority on the list of overextended departments, which lack heritage appropriate maintenance skills. Non-profit operators are faced with unrealistic maintenance and capital responsibilities that they do not have the resources to support, putting funds into assets that do not belong to them.

Best Practices

It is important for all partners to understand roles as tenant(s) and landlord and how that relationship plays into the way that the site is cared for. Formalize these roles in writing in the agreement. Heritage sites are distinct from other types of public and cultural facilities and require special consideration in their maintenance and upkeep. Generally, minor maintenance is best addressed by the operator who has a regular presence at the site, while major maintenance and capital upkeep are the responsibilities of the owner.

Owners, Operators, Third Parties: Try This

Funding for capital upgrades is a major source of conflict at shared stewardship sites. Despite the best intentions, owners, operators and third parties find themselves without the financial resources to care for depreciating heritage buildings with costly needs. When the demand for funds is straining your partnership, it may be worth exploring alternative funding strategies. For example, establish a capital fund that each party contributes to annually, or apply together on infrastructure grant opportunities available to governments. A coordinated effort can reap rewards.



Best Practices for Owners

- Caring for the site cannot be “handed off” to an operator or third party. It is a shared endeavor, and you must offer support. Recognize the limited capacity of non-profit organizations in addressing costly, resource dependent upkeep, and work together to come up with a balanced, realistic plan for maintaining the site so that it lasts into the future for public use.
- Come up with another plan: if the department assigned to supporting maintenance cannot address their needs, can a more realistic plan for care be developed?
- Understand heritage buildings as distinct from other types of facilities under your care – they require an alternative approach to asset management.
- Ensure those responsible for performing maintenance are trained in appropriate care procedures for heritage features. This may mean sub-contracting aspects of maintenance work to specialists - listen to the recommendations of the operators holding expertise.
- Work with the operator to address maintenance needs, respond to their requests, and be considerate of their scheduling.

Best Practices for Operators

- Be realistic about the responsibilities you take on. Realize when you are in “over your head” and are unequipped to perform maintenance if you do not have the expertise or capacity to do so. Have open and honest conversations with your partners to identify solutions.
- Recognize that public works departments are often overstretched in their maintenance duties. If this becomes an issue that detracts from site growth and visitor experience, an alternate arrangement should be explored.
- Work with the owner to identify appropriate contractors for maintenance of heritage features or suggest resources and opportunities for the owner’s staff to learn about heritage maintenance.

Owners, Operators, Third Parties: Try This

Funding for capital upgrades is a major source of conflict at shared stewardship sites. Despite the best intentions, owners, operators and third parties find themselves without the financial resources to care for depreciating heritage buildings with costly needs. When the demand for funds is straining your partnership, it may be worth exploring alternative funding strategies. For example, establish a capital fund that each party contributes to annually, or apply together on infrastructure grant opportunities available to governments. A coordinated effort can reap rewards.

PART 6: Telling the Story

What We're Hearing

Weak partnerships affect the ways that stories are told at historic sites, limiting the development of sound interpretive strategies that effectively engage citizens and visitors. Interpretation is most often addressed almost entirely by operators with the support of third parties and high level oversight of site owners. Owners may work more closely on interpretive projects in the case of some publicly owned sites, such as Parks Canada sites, where owners hold interpretive expertise. Programming becomes restrictive and potentially poor when owners enact too much control over interpretive development, or when political perspectives of a government limit storytelling.

Another common issue exists in the logistics of offering public programming and events, as operators and third parties find themselves challenged by impractical permit requirements or restrictive policies, regulations, and public access imposed on by site owners.

Best Practices

Interpretation, programming, and community engagement are essential to animating sites to render meaning in the public realm and relevancy to people's lives. Sites that are thriving are usually communicating stories in innovative ways, drawing on place-based histories to address contemporary themes and issues. Mutual trust must be established between partners so that those responsible for animating the site can do so with freedom, flexibility, and creative vision that re-imagines the function of historic sites as socially relevant spaces.

Owners, Operators & Third Parties: Try This

Too often, sites are fully engaged in the business of staying alive and interpretation falls to the wayside. Try having an annual board/committee meeting of all partners that examines the year's interpretive offerings and provides feedback on each event's successes and difficulties. Formulate the discussion into direction to continue moving the interpretive program forward.



Best Practices for Owners

- Maintain control over liabilities while providing operators with enough freedom and flexibility to lead the development of programming.
- Encourage operators/third parties to address current topics that align with community needs - without imposing too much direction.
- Try collaborating in your programming. Can you include the operators/third parties of the site in your own event planning?
- Don't make it harder for operators and third parties to animate the site! Explore ways to exempt them from unnecessary permits or offer a reduced partner rate. Understand that your partners are trying to create cultural and recreational experiences for the public that benefit the community.

Best Practices for Operators

- Pay attention to the goals, objectives, and community interests of the owner and design your programming to reflect it, on a high level.
- Advocate for a diversification of the stories you tell - you may need to demonstrate the traditional approach of historic sites is being re-envisioned.
- Don't forget your primary role as keeper of the site's stories. It is easy to become distracted by financial and operational responsibilities. If you are limited in your ability to fully address interpretation, consider involving a third party to focus on animating the site.
- Consider collaborating with the site owner to develop stronger programming, or with other sites under the same ownership.
- Private operators: Don't exclude third parties working to integrate interpretation and public use into the site, try to find compromise in allowing public access that does not affect private events/rentals so that the site's history can still be told.



Learn More

Case Study: The Benefits of Third Parties: Halifax Citadel — <https://regenerationworks.ca/4-2-case-study-the-benefits-of-third-parties/>

Case Study: Entrepreneurial Spirit and Innovative Storytelling: Loughheed House — <https://regenerationworks.ca/4-3-case-study-entrepreneurial-spirit-and-innovative-storytelling>

Storytelling for Social Change — <https://workingnarratives.org/wp-content/uploads/2016/02/story-guide-second-edition.pdf>

National Trust, Tip Sheet: Telling Your Story to Grow Your Audience — <https://regenerationworks.ca/tip-sheet-telling-your-story-to-grow-your-audience/>

Park People — <https://parkpeople.ca/resources/en/resource/20432/7-key-insights-on-reimagining-public-engagement-in-parks-and-public-spaces>

PART 7: Staffing and Volunteer Strategies

What We're Hearing

Consistent and appropriate staffing makes all the difference. High staff turnover among owners, operators, and third parties is one of the most cited issues at shared stewardship sites, creating ruptures in the relationship. Progress is often delayed or derailed as new staff is oriented to site details and relationship history. A lack of documentation creates issues for those stepping into a new role as they attempt to navigate the relationship with inadequate knowledge.

An operator's ability to effectively staff a site is tied to funding availability. When a site is not managed under secure and sustainable financial circumstances, there are fewer opportunities for a full, permanent team of staff. Overreliance on the support of passionate volunteers in place of paying skilled professionals, as is commonly seen, is not sustainable in the long term.

Best Practices

Staffing strategies and structures are a key factor in the success of shared stewardship sites. Consistency in staffing at all levels sets the stage for the development of a long lasting, collaborative relationship. When changes in staff occur, it is important that new staff are thoroughly educated about the partner relationship and how it works. Detailed documentation can support a smooth transition that does not disrupt the partnership.

Best Practices for Owners

- As owners are often distanced physically from the sites they manage, it is important to have staff who fully understand the ins and outs of each site in their portfolio.
- Assign adequate human resources to managing the partnership and supporting its needs.
- Understand that staffing a site with professional expertise requires funding to appropriately address professional level compensation.

Best Practices for Operators

- Having strong leadership among your staff is essential to the site's success. The strongest sites are often led by individuals with long term commitment and an innovative leadership style.
- Respect the role of volunteers as supplementary to operations. If you cannot afford to hire staff, the bigger issue of financial sustainability should be explored in the partnership.

Best Practices for Third Parties

- Third parties community groups are most often comprised of volunteers. While their contributions and community advocacy are essential to the site, dedicated staff are needed to fully address site operations on a professional level.



Learn More

Canadian Museums Association – Human Resources Guidelines — https://www.museums.ca/site/hr_toolkit

A Matter of Design: Job Design Theory and Application to the Voluntary Sector — https://volunteer.ca/vdemo/EngagingVolunteers_DOCS/A_Matter_of_Design_Job_Description_Theory_and_Application.pdf

PART 8:

Communicating Your Needs

What We're Hearing

Strong communication is the key to a positive partnership. When communication is fraught, it can lead to breakdown in other areas of site management. Owners are faced with aligning themselves internally to manage the site. At the same time, operators and third parties are often challenged by the complex nature of communications within governments, having a hard time reaching contacts spread across multiple departments. Sites can also become isolated from the community fabric from a lack of communication with sites under the same ownership.

Best Practices

Set your partnership up for strong communication by designating a clear point of contact for each party in the partnership agreement. The contact may need to change as the partnership evolves and roles become more defined. Be respectful of each party's communication style and capacity to communicate – cultural factors or limited human resources may influence response timelines. Don't underestimate the importance of informal relationship building and getting to know the people on the “other side.”

Operators & Third Parties: Try This

Keep in touch with the site owner – actively highlight the successes of your work in informal ways, such as sharing projects and achievements with City councillors or officials or by tagging the owner in social media posts (where appropriate). It is important to keep the owner and associated stakeholders in the loop about the value of the site to the community.



Best Practices for Owners

- Simplify lines of communication to the best of your ability and understand the incompatibilities of bureaucratic and non-profit structures.
- Create opportunities for sites under your ownership to connect and network with you and each other.
- The way that an owner values a site and perceives it as either an asset or liability, is key to its success. Work to keep yourself informed of the valuable contributions by your operating partners by checking in with them and getting to know how the site is enhancing the community.

Best Practices for Operators & Third Parties

- Make yourselves heard - assert your needs and advocate for the site in a clear, direct way. The owner can't address issues if they don't know about them.
- When multiple third parties are involved, consider designating a lead third party as a point of contact to avoid overcomplicated communications.



Learn More

Case Study: Ownership of Multiple Sites City of Calgary, AB; Regional District of Fraser-Fort George, BC; The Canadian Heritage of Quebec, QC – <https://regenerationworks.ca/4-4-case-study:-ownership-of-multiple-sites/>

The Partnership Culture Navigator – <https://bccic.ca/wp-content/uploads/2016/04/PC-Navigator-v1.0.3.pdf>

Parks Canada - Best Practices and Lessons Learned in Indigenous Engagement – <https://www.pc.gc.ca/en/agence-agency/aa-ia/te-wt/tdm-toc>

Communicating with Elected Officials – https://higherlogicdownload.s3.amazonaws.com/NMSC/390e0055-2395-4d3b-af60-81b53974430d/UploadedImages/Advocacy_Toolkit_-_Communicating_with_Elected_Officials.pdf

4. Case Studies

- Clear Roles and Shared Objectives: Glenhyrst Art Gallery
- The Benefits of Third Parties: Halifax Citadel
- Entrepreneurial Spirit and Innovative Storytelling: Lougheed House
- Ownership of Multiple Sites: City of Calgary, AB, Regional District of Fraser- Fort George, BC, The Canadian Heritage of Quebec, QC



Case Study:

CLEAR ROLES AND SHARED OBJECTIVES: GLENHYRST ART GALLERY

The Partnership

This large 16-acre site along the Grand River was bequeathed to the City of Brantford in 1956 to serve as an art gallery, and since 1986 has been operated by the Glenhyrst Art Gallery, an independent non-profit charity. The Gallery is housed in the former residence built for entrepreneur Edmund Cockshutt, and a portion of the ground floor is occupied by The Golden Tea Pot, a tearoom operated under a commercial lease agreement. The outbuildings, including the former Coach House, serve as additional programming space for the Gallery.

The City retains the responsibility for general maintenance of the buildings and grounds, while the Gallery addresses any maintenance or improvements directly related to their programming - including major capital works specifically designed for their needs. The City provides annual financial support to the Gallery's operating costs - approximately 20% of the overall budget. The remaining budget revenue comes from programming income and fundraising.

Why It Works

Glenhyrst's long-standing vision and mandate as an art gallery has created an undeniable stability. However, the real success of the site is based on the active collaboration between the partners. This collaboration goes beyond clearly defined and respected responsibilities laid out in the lease agreement, extending to actively supporting each other's goals. For example, when planning the capital campaign to fund a major renovation of the Coach House to better accommodate the Gallery programming, the partners accessed multiple funding sources, each taking the lead when best positioned to succeed.

The Gallery Director plays an important role on the City's Cultural Advisory Committee, and so helps create city-wide cultural plans that may in turn have an impact on the Gallery's programming. This opens the door to other kinds of collaborations off-site that reflect well on both partners, engages broader communities in creative new ways, and demonstrates the value of the site and partnership to the owner.

Location: Brantford, Ontario	Owner: City of Brantford
Typology: Large/Complex, Small Urban	Operator: Glenhyrst Art Gallery
Model: Owner with Operator - Non-Interpreted Site	Third Party: The Golden Tea Pot

Outcomes

Glenhyrst demonstrates the successful operation of a historic site beyond interpretation and preservation, offering an alternative visitor experience that honours the heritage features of the site. Although there is limited active interpretation of the site’s history, the activities that take place at Glenhyrst attract significant community participation. The City is proud of the site, as witnessed in its investment in careful maintenance of the grounds and buildings, and in the trust it has in the Gallery’s capacity to offer the innovative programming. The result is a widely valued community landmark with a sustainable operating model that will last into the future.

Learn more at <https://www.glenhyrst.ca/>



Case Study:

THE BENEFITS OF THIRD PARTIES: HALIFAX CITADEL

The Partnership

The Halifax Citadel is a restored military fortification that sits atop Citadel Hill, built to defend the town against enemies beginning in the 18th century. Today, the responsibility of interpretation is shared by Parks Canada, Halifax Citadel Society, and The Army Museum, who each contribute to animating the site in a unique way. Drawing on their individual strengths, the partners provide a rich experience for visitors and are creating a dynamic asset for the community. As the owner, Parks Canada is responsible for the maintenance and repair of the Citadel buildings, establishes the overall interpretive objectives for the site, and manages the main fixed exhibits. The Army Museum is a non-profit organization that has operated a museum within the building in the Citadel since 1953. Parks Canada contributes funding for the operation of the Museum.

Since 1993, the Halifax Citadel Society has actively supported the interpretation of the Citadel. Primarily focussed on the living history of the site through costumed re-enactments and musical performance, the Society supports its activities by managing the site’s facility rentals, operating an onsite retail and catering business, and running a Pipe and Drumming School. The Society also partners with a local distillery to offer thematic tours and tastings of the spirits aged at the Citadel.

Why It Works

Flexibility on the owner’s part to welcome partnerships to the site, recognizing that such groups are more closely connected to the local community, has set the stage for the Citadel’s success. Although Parks Canada holds their own interpretive expertise, they have made room for the Society and Army Museum to tell aspects of the site’s story in their own distinct ways. While Parks Canada leads the direction of interpretive development and develops the Citadel’s core exhibits, The Army Museum focuses on military-based collections and exhibits. The Society rounds out interpretation through personal and experiential offerings such as military re-enactments, performances, and tours.

The passion and entrepreneurial spirit of the third-party partners pushes them to accomplish things that the owner is not able to do due to bureaucratic limitations. By nature, smaller organizations have greater flexibility to try new ideas and access other sources of funding; they can also be more outward looking and have access to contacts that owners often do not. For example, when the Society collaborated with the local Tourism Centre to have costumed staff welcome cruise ship passengers as they arrived, or by offering a paid service for off-site ceremonial guards played by costumed staff.

Location: **Halifax, NS**

Typology: **Large, Urban**

Model: **Owner with Third Party Community Groups**

Owner: **Parks Canada**

Third Parties: **Halifax Citadel Society, The Army Museum**

Outcomes

The partners are critical to the success of Parks Canada's site - a fact that is recognized by those involved. The Halifax Citadel is more integrated into the community than it would be without the partners, attracting new visitors in ways the owner could not do alone. While remaining closely linked to the military history of the site, the activities are conceived and implemented in creative new ways, and the multiplicity of interpretive offerings creates a more dynamic site, as a result.

Learn more at <https://www.pc.gc.ca/en/lhn-nhs/ns/halifax>



Case Study:

ENTREPRENEURIAL SPIRIT AND INNOVATIVE STORYTELLING: LOUGHEED HOUSE

The Partnership

The former home of Senator and Lady Lougheed is restored house and gardens designated as a provincial historic resource and national site which functions today as an Alberta provincial historic site with multiple uses. These uses include a museum, exhibitions and educational programming and events spaces, a shop, and venue rentals. A restaurant is operated through a subcontracted third party. The City first took possession of the 3-acre estate in 1934, and the house and west end of the property transferred to the Province in 1978, following its Historic Resource designation. The Society was formed in 1995 as a non-profit charity to conserve the property and has operated the site since its opening in 2007.

The eastern portion of the property is owned by the City of Calgary and includes city owned park space and the formal, restored Victorian Gardens of the Lougheed House. This portion of the property is maintained by the City's Parks Department, except for the flower gardens and beds, the responsibility for which is with Lougheed House and its gardening team. The Society works with the Province's outsourced property manager to care for the rest of the estate on the western portion of the property, and the House, walkways and a parking lot. Gardens on the western portion of the property are the responsibility of Lougheed House. Maintenance and capital upgrades are the responsibility of the Province, which also provides approximately 40% of the Society's annual operating funding. The Society operates the facility, animates the site and pursues revenue generation through a variety of streams.

Why it Works

A driving factor in Lougheed House's success is that the Society exists solely to operate the site. Their function is clear, and there are few conflicting interests directing the course of their work.

Recognizing that they cannot depend on their Provincial operating funding alone, the Society pursues other revenue streams such as fundraising, membership revenues, grants, donations, and earned revenue through venue rentals, catering commissions, gift shop and restaurant sales, and ticket sales for events to evolve the site and grow its potential for visitors. Their awareness of the connection between financial sustainability and organizational growth fosters a strong entrepreneurial spirit. For example, through the addition of on-site catering services and strategic marketing, Lougheed House is now a premier wedding venue – contributing valuable funds that support the Society in achieving their vision for the site.

Location: Calgary, AB

Typology: Large, Urban

Model: Owner and Operator with Third Party Commercial Groups

Owners: Province of Alberta, City of Calgary

Operator: Lougheed House Conservation Society

Third Parties: Chef Judy Wood and Flavour YYC, Hotel Arts

Lougheed House demonstrates a successful integration of multiple partners, in that the Society, City, Province, and third party contractors work together to leverage their individual skills and resources, particularly in maintaining the grounds, gardens, and historic house. The complexities of the arrangement are approached as an opportunity, rather than a challenge, which benefits the overall development of the site.



Outcomes

The Society's pursuit of diverse revenue streams is critical to its financial sustainability, and the site stands as a strong example of how an historic site can become an economic asset, rather than liability. Lougheed House is also becoming a place where important, often untold stories are being shared through dynamic exhibitions, programs, and events. The Society has effectively demonstrated initiative and competency in their role as operator, allowing them freedom and flexibility to explore the history of the site through non-traditional stories and media which enhance engagement and use of the site for an evolving community.

Learn more at <https://lougheedhouse.com/>



Case Study:

OWNERSHIP OF MULTIPLE SITES: CITY OF CALGARY, AB, REGIONAL DISTRICT OF FRASER-FORT GEORGE, BC, THE CANADIAN HERITAGE OF QUEBEC, QC

The Challenges of Multi-Site Ownership

Owners of multiple historic sites are most often (but not exclusively) governments from all levels, and they are faced with several key challenges. Their portfolio of sites likely includes a range of variations, including: site size and location, reasons for the partnership founding, and value placed on the site by the owner and community.

Sites that are part of larger government portfolios can be subject to shifting budgetary or political considerations, have high staff turnover, and adhere to rigid procedures that impede flexibility. When owner representatives are physically distanced from the sites in their portfolio, their ability to understand local conditions and issues is hindered.

Owners of multiple historic sites are tasked with managing multiple partner relationships at the same time, each with their own dynamics. Partner organizations often have different mandates, capacity and competencies that require individual attention.



Where It's Working

The City of Calgary has taken a unique approach to the management of its 30 City-owned historic buildings – some of which operate as historic sites, while others are leased to non-profit and commercial tenants. Its Heritage Buildings Program is unique in Canada, providing a centralized point of communication between the owner and the operators/tenants of its historic buildings. The program benefits from having a lead staff member with heritage conservation expertise leading the program, who facilitates pro-active assessments of each site's needs on an ongoing basis. This focused approach leads to efficient management of resources.

British Columbia's Regional District of Fraser-Fort George has created a 5-year Cultural Plan that establishes its commitments and responsibilities to support the organizations in its region, including those that operate sites under its ownership. It brings the operators of its cultural sites together in a Joint Cultural Committee that oversees the implementation, adjustment and tracking of the plan's impact. Representatives of the operating partners, such as Huble Homestead's Executive Director, are provided an opportunity to network with other sites in the region and communicate directly with the Region's staff. In addition to providing operating funding, the Region offers separate funding for operator staff training and professional development to build the capacity of the non-profit organizations operating their sites.

In the case of The Canadian Heritage of Quebec Association, a charitable organization that owns 13 historic sites across the province (including 33 buildings and natural sites), partnerships are essential for their stewardship. The owner recognizes the cyclical nature of many local organizations' capacity and that the nature of the partnership agreement can help mitigate the impacts of this. Agreements for each site are tailored to assign roles and responsibilities to best position the partners for success, according to their capacity to manage the site and activities, ability to access funding from other sources, and manage additional partners and stakeholders.

Lessons Learned

- A centralized point of contact for operators/tenants/stakeholders with the multiple departments in larger municipalities/owners is beneficial to all partners for the efficiency and consistency of communications.
- Historic sites under one ownership cannot all be treated the same – the individual nature of the site and the mandate of the partners need to be respected.
- Owners must understand and accept that the advocacy mandate of some partners may result in comments, discussions and even criticism of their management of historic sites.
- An important demonstration of the owner's recognition that partnerships bring added value to the sites, is the assigning of appropriate resources to fulfill its obligations under their agreements.
- Tailored agreements can best position the partners to fulfill their mission and increase the site's access to funding from other sources while attracting greater community participation from new audiences.



Learn more at:

- <http://rdffg.bc.ca/services/arts-culture-heritage/overview-2>
- <https://www.hublehomestead.ca/>
- <https://hcq-chq.org/home/>



Additional Resources

National Trust for Canada - Endangered Places Toolkit

<https://regenerationworks.ca/resources/endangered-places-toolkit/>

National Trust for Canada - Marketing Toolkit

<https://regenerationworks.ca/resources/marketing-your-historic-place-toolkit/>

Regeneration Works Resources

<https://regenerationworks.ca/resources/>

Ontario Museums Association

<https://members.museumsontario.ca/resources/tools-for-museum-practice>

National Trust for Historic Preservation - Shared Use at Historic Sites: A Legal Perspective

<https://forum.savingplaces.org/blogs/forum-online/2015/09/11/shared-use-at-historic-sites-a-legal-perspective>

National Trust for Historic Preservation - A New Era for Drayton Hall

<https://forum.savingplaces.org/blogs/special-contributor/2015/02/12/a-new-era-for-drayton-hall>

The Role of Public-Private Partnerships and the Third Sector in Conserving Heritage Buildings, Sites, and Historic Urban Areas

https://www.getty.edu/conservation/publications_resources/pdf_publications/pdf/public_private.pdf

Park People - Assiniboine Park Conservancy Case Study

<https://parkpeople.ca/resources/en/case-study/3195/assiniboine-park-conservancy>

Vancouver Cultural Land Trust Study

<https://221a.ca/research-initiatives/cultural-land-trust-study>

The Art of Collaboration Toolkit

<https://static1.squarespace.com/static/5be4783125bf025e79d4bfd6/t/5be4fd71c2241b9c71e9ecf6/1541733750207/The+Art+of+Collaboration%282%29.pdf>

Ontario Nonprofit Network Publications

<https://theonnc.ca/resources/publications/>

Shared Stewardship Toolkit

Thank you for your interest in the stewardship of historic sites.

We want to hear from you!

Are there any topics or details that you would like to see added to this toolkit? Please contact us with your thoughts at info@nationaltrustcanada.ca or phone us (toll-free) at 1-866-964-1066.

Regeneration Works

The National Trust's Regeneration Works program helps passionate and dedicated people working to save and renew great historic places across the country.

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www.regenerationworks.ca

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