

# Regeneration Works

A PROGRAM OF THE NATIONAL TRUST FOR CANADA

## Better Together

**A Research Report on Partnerships at  
Historic Sites**

**April 2021**



**National Trust  
for Canada**



***The National Trust for Canada works with owners, operators and community groups responsible for the stewardship and operation of historic sites across the country – places with cultural significance that welcome the public, offer programs and experiences, tell the stories of Canada, and require regular investment and renewal. Through our programs, such as the Endangered Places List, Launch Pad Coaching Grants and Passport Places, we hear first-hand how challenging the stewardship of historic sites can be. With funding from the McLean Foundation, Canadian Heritage, and generous donors, the Trust carried out research in 2020-2021 to better understand the range of partnerships at historic sites, and to learn how partners are working together to resolve common challenges and embed them in their stewardship practices. The Shared Stewardship toolkit and this report present the findings of that research.***

While guiding resources for partnerships and governance are available for museums and public parks, none reflect the specific realities of partnership dynamics at historic sites – those places whose history is being actively interpreted for the public, and that are most often owned by governments or quasi-public entities. For many, the sharing of these responsibilities with partners is central to their stewardship, and how those relationships are established, managed, and refreshed can be core to their success. The findings of our research and the *Shared Stewardship* toolkit will complement the National Trust's resources platform - Regeneration Works – which also provides guidance to groups on revenue generation, advocacy, marketing and more.

This research project has brought a much-needed focus on the issues that face partnerships at historic sites in Canada. Following an online survey and numerous interviews with site operators, owners and third-party community partners, this study has given us a detailed understanding of the nuances and variations that exist in partnerships, of their evolution, and of the solutions developed to overcome gaps and challenges. We also emerge from this study with a fresh perspective on the challenges faced and the opportunities harnessed, when these relationships work exceptionally well. The project has also pointed to areas where more study and work is needed to benefit more owners, operators and third parties involved in stewarding or operating historic sites.

***The main conclusion of our research is that very few sites can rely on a single entity to ensure their long-term vibrancy and relevance – because very few entities have all the necessary resources and competencies required for success. Partnerships were rarer in the past, when dedicated groups of volunteers saved historic homes and managed their operations as local museums. But formalized partnerships are now emerging as the critical factor for the success of these sites – where “success” is measured by their ongoing community relevance, protection of heritage features or values, and financial sustainability.***

## A Research Report on Partnerships at Historic Sites

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Managing any cultural property is highly complex – and even more so in an era of intense competition for funding and attention from audiences that have ever-expanding choices for entertainment and tourism. This has been made even more challenging during the current pandemic which has threatened the viability of many arts and cultural organizations. The fact that many historic sites have traditionally operated informally, with a heavy reliance on volunteers, means that the gap for them to cross to remain relevant and vital is even wider. Yet so many are doing just that, with partnerships playing a key role.

### Research Findings

Through the survey and interviews it was heartening to hear of the renewed vitality of many sites, made possible by highly collaborative partnerships that build on each other's strengths, and to distill the lessons learned from those experiences into the *Shared Stewardship* toolkit. Below are the main findings that fueled our understanding of the issues, and informed the recommendations made in the toolkit.

#### Adapting Rather Than Adopting: The distinctive nature of historic sites and its impact on partnerships

The stewardship of historic sites shares much in common with that of museums and public parks, where explorations of culture, history, public benefit all intersect. Yet, while a great deal can be learned from the important advances in governance considerations for public parks (as seen in the excellent work of [Park People](#) for example) and from the major advances in community engagement in museums (ably lead by provincial museums associations), partnerships at historic sites remain distinct and require the adaptation of practices from other fields.

This distinctiveness arises from important characteristics specific to historic sites. Firstly, how these places came into their owner's possession - sometimes unwillingly, by bequest, or as a response to a threat – has a defining influence the owner's engagement with the site and their desire to engage partners in its stewardship. Few sites have been deliberately acquired to fulfill a planned cultural program of historic interpretation.

The perceived 'frozen' nature of many historic sites also presents challenges. The legacy of a particular historic narrative – one of nation-building / colonization – as represented in the choice to save specific types of sites, is sometimes at odds with contemporary audiences. Engagement with multiple partners with diverse viewpoints can open possibilities of interpretation to meet this narrative challenge.

The public's interaction with public parks and the multiple benefits they provide are reflected in the emerging governance and stewardship practices and structures being developed for parks. While many historic sites have publicly accessible exterior spaces that are park-like, their uses for recreational activities by the broader public is limited in favour of more thematically appropriate activities, and thus further adaptation of new models will be required.

### More Than a Handshake Needed: The risks of informal agreements

Our research revealed that despite a long history of collaboration, the partnerships in place at many historic sites remain unofficial, relying on long-standing personal relationships. Remarkably, it is not uncommon to hear stories of individual volunteers or owner representatives that have been passionately playing the same stewardship role for decades. The stability, understanding and certain success of these relationships are undeniable, however this dependence on personal relationships brings many risks when inevitable change does come. Sudden loss of corporate knowledge and decision-making by new players in the absence of a formalized agreement can destabilize relationships, and foster inefficient and ineffectual shifts in stewardship practices. The lack of a formal agreement can also undermine the value of the site in the perception of others – that they are not taken as seriously.

From our research, it is clear that the rigour imposed by formalized agreements benefits all parties and the historic place itself. There is no one size fits all approach to who should play what role – but the *Shared Stewardship* toolkit points the way forward in applying the principles and lessons learned at successful sites.

The drawbacks of informal agreements appear to be more keenly felt by third parties. The survey results and interview feedback indicate that the important roles played by these groups are perceived to be undervalued and can be a source of irritation in the absence of a structuring agreement.

### Mutual Respect and Trust: The need to balance accountability and independence

Finding the balance between accountability and respecting creative freedom appears to be an ongoing concern for all partners. Some owners expressed frustration with long-standing community volunteer groups that operate their site as a semi-private clubhouse for activities that are relevant only to the group and not the community, with little reporting back to owner. In some cases, operators recount how detailed reporting to the owners goes unacknowledged (or unread), while others contend with an owner that seeks to direct operational activities that are not their responsibility. At the core of many of these conflicts is a lack of understanding and respect for the other's role and a lack of trust.

An issue that emerged in a number of interviews is the advocacy role played by local historical societies that are also sometimes the operators of historic sites owned by the municipality they are often critical of. While public entities must understand and accept the democratic right of groups to advocate for their cause, site operators that play a watchdog role as a major part of their mandate must also understand that this will complicate partnership relations.

### Greatness Thrust Upon Them: Public benefit and government ownership of historic sites

Most government owners of historic sites that we spoke to are rightly proud of their stewardship role, and fully assume this role for the public benefit of assuring an ongoing protection of the place. Others are less motivated owners, who seem to reluctantly bear the legacy and financial responsibility of ownership. Others still are actively seeking to dispose of sites deemed to no longer contribute to the community. Stewardship of historic sites is political, requiring more investment than simply storytelling

and management of old buildings. It requires the savvy building and maintenance of constituencies, and an understanding of the broader political and cultural landscape.

Ultimately, it is the owner that is accountable for the long-term stewardship of a site, and in reflecting the value that the public places on the site. That value is not static and can evolve over time, thus public ownership in perpetuity can never be guaranteed. As a reflection of the community value placed on a site, public owners have the obligation not to put the site at risk due to neglect, and to make their decisions based on meaningful consultation with the community and a full understanding of governance options available to them.

Operators plays an important role in demonstrating the public benefit and contemporary relevance of the site through their innovative programming, engagement with the community and through active communication to the owner.

#### In a Holding Pattern - Smaller non-profit ownership

The stewardship challenges for small non-profit organizations that own their historic sites were raised infrequently in our survey and interviews, likely because those contacted in this research project had limited experience with formalized partnerships – which was the focus of our interviews. This ownership model is anecdotally understood to be more common in smaller municipalities or rural areas, where the options for government ownership or partnerships may be more limited. Many of these sites appear to remain viable, with modest activities scaled to their particular context. Yet because they are very often dependent on the capacity of a volunteer-based organization, and by following the traditional local museum model that is struggling across the county, their longer-term sustainability is questionable. The principles and recommendations of the *Shared Stewardship* toolkit are equally applicable to these cases, scaled appropriately.

Larger non-profit organizations that responded to the survey or that were interviewed indicated similar challenges and successes as other owners in establishing and managing partnerships.

#### What's Next?

It is our intent that the *Shared Stewardship* toolkit will continue to be revised and grow as we learn more about historic sites. The research completed to date had some known gaps, and so we have already identified the next avenues that we hope to explore in the future and share in future case studies or revisions to the toolkit. These include:

- Indigenous models for historic sites: Co-ownership or co-operative management practices for historic sites are emerging across the country and were the subject of two project interviews. These warrant closer attention for their applicability to other kinds of sites.
- New Models for Ownership and Finance: Our research project sought to include examples of historic sites that demonstrated innovative uses of social enterprise principles, social finance models (such as community bonds), or less common ownership structures such as land trusts or conservancies.

While we did examine examples of non-profit organizations that are housed in historic places, their application of innovative models of finance or ownership were very much based on their organizational mandate (that does not include the active public interpretation of the site's history). Yet the applicability of these models to historic sites, warrants further examination for their application to historic sites.

- Navigating Change especially in cases of divestiture or making significant changes to the mandate of a historic place remains major threat to historic sites. On a regular basis we are made aware of government owners making unilateral decisions on their future ownership of historic sites. While responsive advocacy action will continue to be required to ensure meaningful community consultation occurs, the heritage sector also needs to proactively engage with government owners to share best practices for responsible approaches to navigating significant changes to the stewardship model of historic sites.
- Quantitative data on the number of historic sites is very difficult to obtain due to different definitions used and little reporting. This information gap requires further effort to be filled.
- Owners of multiple sites are developing portfolio management strategies and cultural plans, adapting principles and practices from other sources. There is much to be learned and shared from these initiatives for their broader applicability.

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### **BACKGROUND**

#### **Research Project Methodology**

The research for this project included a national survey and stakeholder interviews, with the objective of producing an online toolkit. Our primary focus in this work was on historic sites owned by public agencies whose history is being actively interpreted for the public.

#### **The Survey**

A short online survey was sent out through the National Trust's networks, targeted to those involved in partnerships to steward and operate historic sites. The intent of the survey was to validate assumptions about partnerships at historic sites, to gauge levels of responsibility, to identify the main challenges facing the partners) and to seek suggestions of sites to be interviewed for the project.

The survey consisted of 4 main questions on:

- The division of responsibilities between partners at the respondent's site;
- The areas of responsibility that foster collaboration, and that cause of friction;
- The perceived overall strength of the relationship; and
- The respondent's awareness of successful partnerships at other sites.

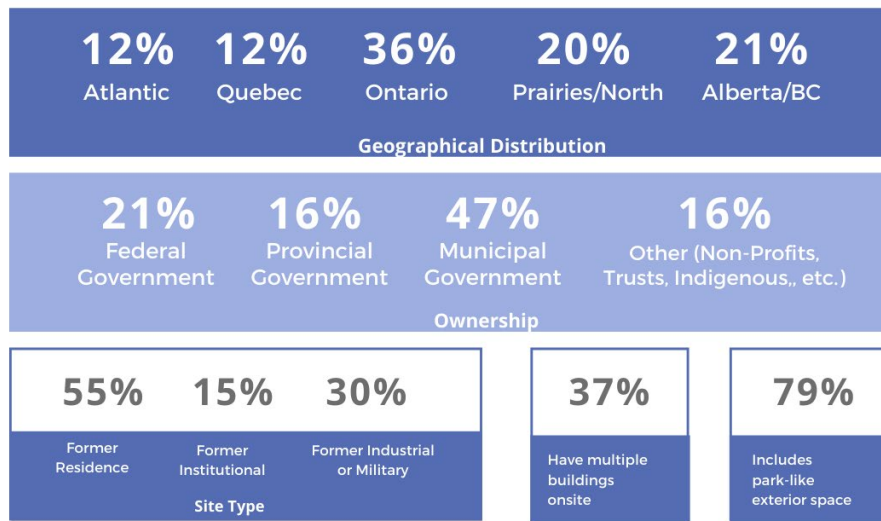
The 60 survey results received provided qualitative data and insight into the challenges facing historic sites. Several respondents self-identified to participate in the interviews and/or made suggestions of other sites that should be included in the study.

#### **Interviews**

Based on the recommendations made by survey respondents and solicited recommendations from members of the Trust's National Council, the project team created a 'long list' of over 75 historic sites and experienced individuals that could potentially be interviewed.

The final list of over 40 interviewees was selected to provide a geographical representation (across the country and from urban and rural settings), a mix of site typologies (larger more complex sites, smaller sites), and a range of partnerships. Interviews were also conducted with several individuals not associated with a specific site, but who have broad experience with partnerships at multiple sites. Because of the occasionally sensitive issues that face the partners, all interviews were conducted in confidence.

### SNAPSHOT OF INTERVIEWS



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For more information on this research or the *Shared Stewardship* toolkit, please contact:  
[nationaltrust@nationaltrustcanada.ca](mailto:nationaltrust@nationaltrustcanada.ca)