

HERITAGE PRESERVATION WORKS



PROCEEDINGS

Heritage Canada Foundation Conference
September 18-21, 2003
Winnipeg, Manitoba

The Heritage Canada Foundation acknowledges
the generous support of

The Province of Manitoba



The British Council



Corporate Sponsors

COHLMeyer
ARCHITECTS
LIMITED



The Marwest Group of Companies

Marwest Development

Marwest Construction

Marwest Management

General Contractor / Heritage Specialists



The Heritage Canada Foundation

5 Blackburn Avenue

Ottawa, ON K1N 8A2 Canada

Telephone: (613) 237-1066

Fax: (613) 237-5987

E-mail: heritagecanada@heritagecanada.org

Web site: www.heritagecanada.org

HERITAGE PRESERVATION WORKS



PROCEEDINGS

Heritage Canada Foundation Conference
September 18-21, 2003
Winnipeg, Manitoba

PUBLISHED BY:
The Heritage Canada Foundation
5 Blackburn Avenue
Ottawa, ON, K1N 8A2 Canada

Telephone: (613) 237-1066
Fax: (613) 237-5987
E-mail: heritagecanada@heritagecanada.org
Web site: www.heritagecanada.org

ISBN: 0-88814-213-7
© 2004 Heritage Canada Foundation

PREPARED BY:
Sheila Ascroft

CONFERENCE PLANNING:
Douglas Franklin
Maggie Villeneuve

EDITOR:
Carolyn Quinn

TRANSLATION:
Pierre Cremer

The views expressed in the summaries
of the conference papers herein are not necessarily
those of the Heritage Canada Foundation.

C O N T E N T S

OPENING REMARKS

Brian Anthony, Executive Director, Heritage Canada Foundation	2
Jim Bezanson, Chair of the Heritage Canada Foundation Board of Governors and New Brunswick Governor	3
David McDowell, Manitoba Governor, Heritage Canada Foundation	3

KEYNOTE ADDRESS

Bram Strain, Director, Human Resources Canada Centre, Winnipeg-Selkirk Human Resources Development Canada.....	4
---	---

SESSION 1: Who Does What in Heritage Preservation?

Robert Shipley, Assistant Professor, School of Planning, University of Waterloo, Ontario	6
--	---

SESSION 2: Focus on Education and Training

Jean-Claude Marsan, Professor, School of Architecture, Planning Faculty, Université de Montréal	
David Osborne, Co-ordinator, Heritage Trades Program, Heritage Institute, Algonquin College, Ontario	
Robert Shipley, Assistant Professor, School of Planning, University of Waterloo, Ontario	9

SESSION 3: Historic Places Initiative: Human Resources in the New Era

Dr. Christina Cameron, Director General, National Historic Parks and Sites, Parks Canada Agency	14
---	----

SESSION 4: Industry Speaks

J. Timothy Flood, President of John Flood and Sons (1961) Limited, Saint John, New Brunswick	
George Gritziotis, Executive Director, Construction Sector Council	18

SESSION 5: Lessons from Afar: The United Kingdom

Paul Boniface, Director of Human Resources and Legal Services, National Trust, United Kingdom.....	22
--	----

PRESENTATIONS FROM INVITED GUESTS

The Hon. Diane McGifford, Minister of Advanced Education and Training, Province of Manitoba	
Raymond Simard, MP for Saint Boniface, Manitoba	26

OPENING REMARKS



The coming generations of workers need to be educated in the field of heritage preservation, otherwise we are facing a real threat of losing more of our built heritage resources.

BRIAN ANTHONY,
Executive Director,
Heritage Canada Foundation

It gives me great pleasure to welcome you to the annual conference of the Heritage Canada Foundation in this our 30th anniversary year. Although we rotate the location of our conferences each year, we are always happy to meet in Winnipeg, at the geographic centre of Canada.

This conference is also a first for the Heritage Canada Foundation – the first conference held on the subject of human resources in the preservation of heritage property. During the past year, the Foundation has conducted research and surveys in this whole area, culminating in the publishing of the report *Human Resource Issues in the Preservation of Heritage Buildings*.

This pioneering report and this conference are a means for better understanding what we refer to as the “invisible army” in heritage preservation – the people who work in the field but who are not counted within the heritage sector. They are lumped under broader categories. We have much to learn about the professions and trades involved in heritage preservation in terms of education, training and job creation. The coming generations of workers need to be educated in the field of heritage preservation, otherwise we are facing a real threat of losing more of our built heritage resources.

A case in point is the ongoing restoration and rehabilitation of our Parliament Buildings in Ottawa, arguably one of the premier heritage sites

in Canada, and one that employs a considerable amount of talent in the professions and trades associated with heritage conservation. From the contractors involved, we know that 80% of the labour force is made up of foreign workers imported for the task. Only 20% are Canadian. This is one of the small issues we are hoping to tackle, not only in the upcoming conference, but also as we move forward in discussions with appropriate officials at all levels of government, in order to have a better understanding of the nature and needs of the heritage labour force.

I hope this conference will generate productive discussions for all delegates and all sectors represented.



JIM BEZANSON,
Chair of the Heritage Canada Foundation
Board of Governors and
New Brunswick Governor

Welcome to our annual Heritage Canada conference in this our 30th anniversary year. The Foundation met in Saint Boniface, Manitoba, in 1995 and we are certainly pleased to be here again. Like you, I have great expectations from this conference. I hope that what Brian has referred to as the “invisible army” might become more apparent to all of those involved in preservation, be they in government, business, or members of the general public.

During the past 30 years or so, heritage preservation has come of age in Canada. There is a skilled workforce in the field in Canada today and all players need to take a proactive approach to human resource planning. I’m especially pleased to welcome our partners in this enterprise — representatives from provincial, federal and municipal governments, the construction industry, educators, and the voluntary sector. I hope this conference will give us a new and continuing forum to strengthen human resource recognition and development in heritage preservation.



DAVID McDOWELL,
Manitoba Governor,
Heritage Canada Foundation

It gives me great pleasure to welcome you to our province and the 30th anniversary of our Foundation. We are often described as being at the beginning of the Canadian West, but our history and our heritage are really a microcosm of all of Canada. People have come from far and wide to leave their architectural and historical mark here.

If you know the difference between a Winnipeg goldeye and a golden boy, then you know you are in the province where this past year a marvellous restoration of our own legislature has taken place. The golden boy has been re-gilded and returned to his rightful place on top of the building’s dome. We hope you get time to see it in its glory. We also know from our history background – Selkirk settlers, the people who came and built the Winnipeg Exchange, the saga of Louis Riel – that there are many things to see and know and celebrate here as part of our heritage. We hope you take the Walking Tour of the Exchange District. Find time to learn more about Winnipeg and about Manitoba – the gateway to Laurier’s “last best West” – the railway and commercial centre of Western Canada.

I would like to thank the people who are contributing to this event, particularly the exhibitors who will tell you a little more about our province.

Have a productive conference.

There is a skilled workforce in the field in Canada today and all players need to take a proactive approach to human resource planning.

KEYNOTE ADDRESS

TOPIC: Human Resource Development Canada's Strategies



PRESENTER: BRAM STRAIN,

Director, Human Resources Canada Centre,
Winnipeg-Selkirk
Human Resources Development Canada (HRDC)

Bram Strain spoke on behalf of George Skinner, Director General, Manitoba Region, HRDC, who was unable to attend the conference.

Mr. Strain began by saying that HRDC is most interested in the directions and ideas coming out of the conference, and in working with Heritage Canada in this area. After all, the conference questions of who does what in heritage conservation, what the educational and training needs are, and what roles and responsibilities volunteers have are also key issues facing HRDC and its partners in sectors and regions across Canada. A human resources strategy is now vital, he said, to meet the growing demand for skills and services in heritage conservation.

Skilled workers are retiring in increasing numbers, noted Mr. Strain, and fewer young people are coming into the trades. At the same time, the growth in technology and the knowledge economy is putting a heightened premium on skills and learning throughout Canadian society. As a result, he said, HRDC is seeing increasing gaps in the labour market. There is simply more demand than supply. These trends are creating new challenges for human resource planners. New ways must be found to create learning

opportunities and develop the skills needed to succeed in today's economy. For its part, HRDC has produced a discussion paper, *Knowledge Matters: Skills and Learning for Canadians*, and held a national summit on innovation and learning. At the summit, stakeholders and experts from all segments of Canadian society tried to sort out the human resource challenges facing the country and identify some directions for the Department to follow.

One key direction is promoting life-long learning, which has become a priority of both HRDC and the federal government. Mr. Strain explained that, in today's world, learning does not just take place in the schools, but has become part of the work culture. It is no longer enough to rely on old knowledge, all Canadians must continue to learn and grow throughout their careers, he said.

To this end, HRDC has re-allocated more than \$25 million in additional support for apprenticeships and skilled trades to improve essential skills, to expand prior learning assessment and recognition, and to increase support for "sector council" projects that address skills needed in the workplace.

Putting more emphasis on partnerships is another direction that emerged from the national summit. Mr. Strain said partnerships are key because no one entity, neither the public nor the private sector, can solve the nation's skills development challenges on its own. By working together, governments at all levels, representatives, employees and employers, and colleges and technical training organizations greatly increase the chances for success. One of the best ways to make this happen is through the sector councils that the Department initiated a few years ago.

Through the sector council, employees and employers work together to formulate human resource strategies that make sense for their industry. There are now 26 sector councils, three of which relate to heritage conservation; these are in the culture, construction and environmental sectors. The sectorial approach can also be valuable when it comes to apprenticeships, both in reinforcing their effectiveness and encouraging more young people to enter

the trades. The federal government has invested \$12 million in the Canadian Apprenticeship Forum and Skills Canada, which help promote skilled trades as a rewarding career option for youth. The apprenticeship idea of combining work and learning is one that has application beyond the traditional model.

Mr. Strain envisioned future workplaces as learning places that benefit both employers and workers. In addition, the value of inclusiveness in the workplace must be emphasized. Inclusiveness, he said, means ensuring that none of the talent that is available in Canada is wasted.

HRDC wants to include members of groups in Canadian society that are underrepresented or underutilized in the workplace, such as Aboriginal people, persons with disabilities, and recent immigrants. Aboriginal youth are the fastest-growing segment of Canada's population at twice the national average. Some 400,000 Aboriginal youth will enter the workforce in the next 20 years. Mr. Strain remarked that this is both a challenge and an opportunity for young Aboriginal Canadians and the federal government. The 2003 Budget has accordingly allocated \$72 million to provide Aboriginal Canadians with training and employment opportunities in major projects across Canada.

HRDC also sees opportunities to include more persons with disabilities in the workplace. Although they often have the required skills, they face barriers that prevent their full participation, noted Mr. Strain. However, if more qualified people can be brought into the workplace, the investment is worthwhile, both economically and socially.

Finally, a more inclusive workplace means including more immigrants. Returning to Brian Anthony's information that 80% of the workers restoring the Parliament Buildings are immigrants, Mr. Strain said that Canada has an international reputation as an open and welcoming society, and that immigrants can help meet the demographic challenges facing Canada.

Statistically, in 1991, recent immigrants made up 13% of what is considered the highly skilled part of the workforce. By 2001, the proportion

was up to 24%. However, it takes longer for the earnings of skilled immigrants to reach the same level as those of their Canadian counterparts. One of the chief obstacles has been the recognition of foreign credentials and qualifications. The 2003 Budget committed some \$41 million over two years to attract and better integrate skilled immigrants, stated Mr. Strain. Chief among these measures will be to work with the provinces and territories, regulatory bodies, industries and other stakeholders to develop an effective process for foreign credential recognition. Mr. Strain encouraged delegates to consider the potential of workers from these under-represented groups.

With regard to another valued human resource – the volunteer community – HRDC estimates that some 6.5 million Canadians are volunteers; this is equal to 27% of the population aged 15 and older. In the year 2000, volunteers provided one billion work hours. In addition to volunteers, some 900,000 (8% of the workforce) paid employees across Canada work in the voluntary sector. This number is equal to all employees in the country's construction, mining and gas industries combined. It is an important part of the Canadian economy, said Mr. Strain, and the health of the voluntary sector is a concern for the federal government.

HRDC is helping to address these issues by participating in the national research project being carried out under the federal Voluntary Sector Initiative. The project is developing a profile of the sector and its needs for capacity building, Mr. Strain told delegates. The voluntary sector touches virtually all aspects of Canadian society: social justice, human rights, environment, health communities, arts, culture and sports organizations and heritage conservation organizations like Heritage Canada. The government recognizes that Canadian society is enriched by the work of these individuals and groups and wants to strengthen the sector.

The challenge is to define the characteristics of the preservation workforce itself. The Heritage Canada study *Human Resource Issues in the Preservation Of Heritage Buildings* has identified this as a key issue. If the demand for the

skills and services of heritage preservation professionals and tradespeople continues to increase – and it seems likely – HRDC and Heritage Canada will have some common interest to build upon, he said. The Heritage Canada report has given HRDC a good base from which to start, and the conference discussions will add to that picture, concluded Mr. Strain.

SESSION 1:

Who Does What in Heritage Preservation?

TOPIC:

During the past 30 years, a cohort of heritage preservation workers has flourished in Canada. Who are they? Where are they? What do they do?



PRESENTER: ROBERT SHIPLEY,

Assistant Professor, School of Planning,
University of Waterloo, Ontario

Dr. Robert Shipley, who is also the new Chair of Heritage Resources at the University of Waterloo, commented on specific aspects of the Heritage Canada report *Human Resource Issues in the Preservation of Heritage Buildings*. He then offered some recommendations based on his perspective as a long-time researcher and educator in the heritage field. For his presentation, he consulted with Ottawa heritage consultant Margaret Carter, as well as Marc Denhez, long-time activist and lawyer for the Canadian Home Builders Association.

Dr. Shipley divided his presentation along the same sections as the *Human Resource Issues* report, recapped its highlights and provided commentary.

What we know. The heritage community knows that renovation is a huge business in Canada (\$27 billion annually), that there is a shortage of tradespeople working in that area, and that there are few education and training programs available in Canada to prepare people for work in the heritage conservation field. The Canadian Home Builders Association found 28.6% of their

builders report a shortage of bricklayers and 23.8% report a shortage of carpenters. The statistics also show that the average age of bricklayers in Canada is 58.

What we don't know. Dr. Shipley said it is necessary to find out how many people actually work in the field, how they are directly involved in heritage (as distinct from other parts of their work), and what is the aggregate economic impact of historic conservation.

Background on the importance of preservation. Delegates were told about Margaret Carter's report prepared for the Department of Canadian Heritage a few years ago that estimated 20% of pre-1941 buildings have been lost over a 30-year period. Dr. Shipley's own research has found that, in some Ontario communities, as many as 20% of officially designated heritage structures have been lost. He cautioned that this is an extreme example, but it does point to the problem the heritage community is facing.

Defining heritage. While HCF's report outlines some of the difficulties in defining built heritage, officially recognized or designated structures represent far too small a group to be statistically significant. According to Marc Denhez, less than one-third of 1% of the buildings are officially recognized as historic.

Dr. Shipley said Canada's built heritage must be defined in a way that includes the greater part of the vast building stock that gives character to Canadian cities, towns and villages. These structures also represent an enormous private-sector asset since 1 in 7 is pre-Second World War, 1 in 14 is pre-First World War and 750,000 are century-old homes.

He surmised that the real value of built heritage to the economy would be quite different if all of the older building stock were included in data gathering. It would drastically alter the answer to how many people earn at least part of their living working on older buildings. Much of government policy and local decision making is based on perceptions of economic importance. Dr. Shipley noted that while film makers receive tax incentives in Canada to make

movies in Toronto that pretend it is New York, it is not possible to get similar tax treatment to preserve Canadian cultural heritage in the form of the built environment. This needs to be changed.

Overview of the industry. The HCF report shows that more than half of the construction in Canada is renovation and not new building. Renovation is more labour-intensive and therefore it contributes more to local economies. But, a clearly delineated classifying system for these occupations is vital if we are to influence government policy. Dr. Shipley found it absurd that an architect who makes a plan for a renovation is considered to be doing cultural work, but that the carpenter, plasterer and mason who carry out the work are not deemed to be involved in cultural activity. This also needs to change, he stated.

Trades needs. Shortages of skilled tradespeople are well documented and explained in the report. Given that the crisis is not confined to the heritage renovation sector, but also exists, for example, in car manufacturing, which is short of machinists, he suggested heritage advocates could and should be joining with Honda and GM and others to encourage more young people into the trades. Although there is some discussion of that at HRDC, there needs to be more, said Dr. Shipley, acknowledging that importing skilled workers should be part of the solution.

The needs and trends in professions. The *Human Resource Issues* report mentions the influence that contractors have on maintenance and renovation, and the impact of their decisions. A heritage house may have paint removed from its brick walls in the course of its restoration, but who advised the owners to have it painted in the first place?" he asked rhetorically.

Dr. Shipley said that historic conservation is not just about plaster and mortar, but often involves a property purchase, thereby involving the real estate profession. It may also involve mortgaging and borrowing, which brings in lawyers and bankers. It is also about site approvals, involving planners and developers and local council members, and it is also about

hardware and paint, which involves manufacturers and merchandisers.

Real estate agents and bankers were singled out for not understanding the value of older buildings and the healthy market that exists.

Benjamin Moore, whose line of heritage paints was developed for heritage homes in Vancouver, was praised as a good supporter of Canada's built heritage.

Planning and development can encourage the adaptive reuse of downtown buildings or it can encourage further suburban sprawl. Another planning dilemma mentioned by the speaker involves heritage landscapes. While Ontario has some of the strongest preservation language regarding landscapes, planning regulations can unfortunately undo good land stewardship.

Educational institutions. The report does an important job in providing a fairly comprehensive catalogue of programs and courses in historic conservation. However, the real issue is that there are very few of them, commented Dr. Shipley.

Data collection and analysis. Regardless of the difficulties in gathering cultural statistics (as outlined in the report), it is vital that it be done, said Dr. Shipley. Again, he suggested that heritage proponents must be like other factions of society who, when making a bid for scarce resources, both private and public, argue on the basis of their projects' economic impact.

Delegates were told that if they could convince more bankers, planners, developers, city councillors and real estate agents that working with older buildings is cost-effective and productive, offers a good return on investment, is socially progressive, etc., then the opportunities for skilled labour and heritage architects will follow naturally.

Recommendations. There is a need to educate the educators in the heritage field. Heritage Canada could publish and update the listing of education and training programs in heritage conservation, and invite educators to the annual conference so they could make contacts and co-ordinate activities. As well, Heritage Canada could join other

organizations, such as the International Council on Monuments and Sites (ICOMOS) and the Canadian Association of Professional Heritage Consultants (CAPHC), in creating an accreditation body for historic conservation courses and programs in the same way the Canadian Institute of Planners and the provincial architects' associations set standards and accredit training programs in their fields.

It would also be necessary to reach out to the critical professions and educate them or help them educate their members. The building professions are already very aware of their shortages in skilled labour; however, bankers, realtors, architects, planners and politicians are less aware of their role or influence.

According to Dr. Shipley, two key elements to education and training programs are needed: content and infrastructure (mechanism for delivery). All the pertinent professions and trades have the infrastructure in place for delivering information to their members; what they lack is an appreciation of the importance of heritage issues and, more significantly, they lack heritage content for the education they do deliver. He recommended that Heritage Canada offer to be on the speakers' list for other professional conferences or provide heritage conservation material to professional journals.

Heritage Canada could also promote educational material to the continuing professional development programs that exist in most professions. (This idea ties in to the HRDC concept about life-long learning, which was discussed in the keynote address.) The Canadian Institute of Planners (CIP), for example, has just adopted a compulsory continuing learning program, and heritage conservation is a clear element in the planning institute's statement of values. However, the CIP is lacking course content that would enable members to upgrade their education.

Another recommendation was that Heritage Canada lobby organizations for the inclusion of heritage material/studies in the certification of professionals (e.g. the real estate boards that certify their members). Finally, Heritage Canada, ICOMOS and CAPHC should work

with the Canadian Home Builders Association and the Building Owners and Managers Institute and the unions to co-ordinate provision of suitable training material for apprenticeship and other training programs.

In the area of research, Dr. Shipley recommended that Heritage Canada continue to work with the federal government on better data collection and statistics surrounding the question of who works in heritage. However, he said, a range of other research is needed: architectural research to answer technical matters such as floor loading in a timber building; and economic research to calculate the return on investment for adaptive reuse projects and discover the conditions that affect that return. Dr. Shipley told delegates that he has five graduate students doing research on historic conservation issues and suggested that Heritage Canada could identify a reasonably comprehensive list of questions so that students can have subjects to start on. The research questions should be prioritized, and the most important ones should get funding. As an example, Dr. Shipley suggested that the Canada Mortgage and Housing Corporation set up a special fund for research in historic conservation.

Most importantly, however, Heritage Canada should continue its plans for a national strategy to address and prioritize the issues in human resource development in co-operation with other organizations.

DISCUSSION/QUESTIONS

Brian Anthony (Executive Director, Heritage Canada) noted that Heritage Canada is working very closely with the Federation of Canadian Municipalities on their forthcoming conferences and that he was working to ensure Heritage Canada would have a presence at their sustainable development conference next year. Mr. Anthony said he had also been collaborating with the Canadian Institute of Planners and that Heritage Canada would be contributing to the new CIP journal. HCF has also been working with the National Round Table on the Environment and the Economy.

Harold Kalman (B.C. Governor, Heritage Canada) elaborated on the extensive problems and ultimately costly solutions that can result when uninformed contractors recommend interventions such as painting masonry.

Nicholas Bawlf (B.C. architect) agreed with Dr. Shipley's comment that many professional organizations have mandatory requirements for continuing education. However, many of those have little reference to education in the heritage field. He suggested it might be useful for Heritage Canada to communicate with those provincial associations and suggest they include courses on the heritage conservation of buildings.

Steve Barber (Heritage Planner, Victoria, B.C.) addressed the problems in trying to adapt the National Building Code to older buildings. He commented that some provinces have instituted sections that deal with equivalences for heritage buildings in an attempt to alleviate the restrictions to restoration. He suggested that more work needs to be done in this important area.

Robert Shipley replied that Ontario also has its own building code and part of it also deals with equivalences. There is much information that can be used by building inspectors for equivalences. He gave the example of having a 36-inch-wide staircase while the present building code calls for a 48-inch one: in the case of a heritage building the older standard can be substituted. The problem is that many building inspectors don't know that section of the building code. It would be a good strategy to offer workshops for building inspectors to inform them about the use of equivalences.

Lyse Blanchet (Public Works and Government Services Canada) said she is part of a new program called the Heritage Conservation Professional and Technical Program, as well as being Chair of the scientific committee on training and education for ICOMOS and the structural engineer for the heritage conservation program. She said she has noticed that over the years the National Building Code has developed a key commentary, which deals with existing structures. Now there is an international standard organization (ISO 13822) which deals with reliability-

based design for existing structures. This could be an answer for heritage structures as well. She offered her services to Heritage Canada for any national strategy on training and education.

Steve Barber (Heritage Planner, Victoria, B.C.) commented that he was astonished by the lack of Canadian heritage representatives (he was one of three who attended) at the Washington, D.C., conference sponsored by the National Parks Service on Building Codes and Historic Rehabilitation. He received a binder full of U.S. reports, among them a rehabilitation code from the State of New Jersey which, over the past five years, has helped reduce the cost of rehabilitation in the state by 30% to 40%. He said he offered the idea to Victoria's senior building inspectors, but they were not interested because of Canada's liability issues.

Pamela Madoff (Councillor, City of Victoria) spoke about the impact of the building code on restorations. While Victoria has a fairly good track record in preserving and restoring its old buildings, she thought that restoring a building without using the available building code equivalencies was almost worse than leaving it alone. Much of the fabric of those buildings is being destroyed to keep up with the code, particularly when the issue of seismic constraint is applied.

Ms. Madoff also agreed with Mr. Barber that liability for municipalities is an issue. She explained that "joint and several liability" can leave the municipality on the hook for all liability costs. She stated that many jurisdictions are actually no longer providing inspections as a way of avoiding liability. She recommended that Heritage Canada look at the legal implications involved in "joint and several liability."

Robert Shipley suggested this problem could be mitigated by convincing people that old buildings are "tried and true," and will still be standing years from now. He suggested that old technologies ought to be codified and used.

David McDowell (Manitoba Governor, Heritage Canada) said that Heritage Canada would have to work on convincing banks and insurance companies that heritage properties are good investments.

SESSION 2 :

Focus on Education and Training

TOPIC:

How well are we educating and training the next generation of heritage preservation workers? In recent years, educators have developed innovative programs in architecture, planning and heritage restoration trades.

PRESENTERS:

JEAN-CLAUDE MARSAN,

Architect and Urban Planner,
Professor, School of Architecture, Planning
Faculty, Université de Montréal
Head, Masters Program in the Preservation of
Built Heritage

DAVID OSBORNE,

Co-ordinator, Heritage Trades Program,
Heritage Institute, Algonquin College, Ontario

ROBERT SHIPLEY,

Assistant Professor, School of Planning,
University of Waterloo, Ontario

Jean-Claude Marsan spoke to delegates about the Planning Faculty at the University of Montréal, which is the only one in Canada that offers comprehensive graduate programs in the preservation of built heritage. These programs include a Masters and a PhD.

The Masters program, Preservation of the Built Environment (PBE), is a 45-credit, two-path program. One path involves courses for students aiming towards intervention, and the other includes a thesis for those more interested in research or wishing to pursue a PhD. Since its inception in 1988, the program has turned out approximately 100 graduates, most of whom are now working in the public service, architectural and urban planning firms, or teaching. As well, some have become independent workers specializing in heritage studies.

Professor Marsan said students can also pursue doctoral studies in the preservation of built heritage. The main admission criterion, other than previous satisfactory training, is the submission of a thesis topic that can be supervised by one or more professors. Professors from Canada or abroad



Left to right: Jean-Claude Marsan, David Osborne, Robert Shipley.

may be involved with this type of mentoring. For example, several years ago, Professor Marsan supervised a doctorate involving the study of the Reims cathedral buttresses to determine construction dates. Supervising this research was possible only because an Art History professor agreed to act as co-supervisor.

Noting that the Planning Faculty has 15 years' experience in the preservation of built heritage, the speaker discussed some of the key lessons learned.

His first observation was the extent to which the field of built heritage preservation has developed. In the mid-1980s, when the PBE Masters program was launched, in partnership with Heritage Montréal, the understanding of the field was not what it is today. At that time, programs were modelled on those renowned in U.S. and British universities, and designed solely around the preservation of buildings. The PBE program therefore included such courses as the Preservation of Public Architecture, Preservation of Commercial Architecture and the Preservation of Residential Architecture.

Professor Marsan explained that this approach of dividing the knowledge and intervention field into several virtually isolated subfields soon proved unsatisfactory because preserving buildings without preserving their sites and physical surroundings made little sense from a cultural perspective. The 1988 program was substantially

redesigned in mid-1995 shifting the focus to the preservation of the built environment, which included the "constructed" environment of buildings, engineering works, and sites and districts (including urban shapes, suburban neighbourhoods and cultural landscapes).

The speaker then recognized several people who gained their experience in the field but had contributed a great deal to the development of the university's program. Two former Parks Canada employees, Jacques Dalibard and Herb Stovel, became professors. Susan Buggie, after retiring from Parks Canada's Historic Sites Division, became an associate professor at the School of Landscape Architecture in the Planning Faculty and now is regularly involved in the PBE program. Professor Marsan noted that the Historic Sites and Monuments Board of Canada revealed other heritage dimensions such as commemoration and advanced research in areas like cultural landscapes.

The concept of cultural heritage is changing quickly, he said, so it is important for education and training programs to change along with it. One way to accomplish this is to establish connections and partnerships with organizations that are immediately facing this change, such as Parks Canada, the International Council of Monuments and Sites (ICOMOS), the International Centre for the Study of the Preservation and Restoration of Cultural Property (ICCROM),

the Association for the Preservation of Technology International (APTI), etc.

Professor Marsan explained that the concept of built heritage — which originally involved historic monuments deemed significant for their aesthetic, prestige and national identity reasons — has gradually expanded to include symbolic, social, technological, environmental, economic and other values. In short, built heritage includes meaningful landscapes. Such a change has made it necessary, he said, for training programs to take a more interdisciplinary approach. He recommended that places of instruction encourage this interdisciplinary approach where possible and be open to students with diverse academic backgrounds.

The Planning Faculty, with its Schools of Architecture, Landscape Architecture, Industrial Design and Urban Planning Institute, is the most comprehensive faculty of its kind in Canada. It promotes interdisciplinary contact by inviting professors from other university departments, such as art history, archaeology, geography and engineering, to supervise theses, guided studies and student research.

Admitting students with different academic backgrounds (the PBE program has accepted students in architecture, urban planning, engineering, landscape architecture, art history, history, archaeology, law, and even canon law) requires that each must have quality instruction at the Masters level. This problem was solved by developing a program philosophy that fosters a creative attitude in the student towards the preservation of built heritage that draws on their basic academic background. Two types of instruction and training have been adopted for this: mandatory studies and guided studies.

The PBE program's five mandatory courses are designed to provide all academic profiles with a common knowledge base.

□ History of Preservation Theories traces the development of the concepts of heritage and the preservation of the built and natural environment. It also presents the international conservation charters and organizations associated with the field.

■ Preservation Management Frameworks covers the international, national, provincial and local jurisdictions, and the policies, programs, strategies and mechanisms specific to the preservation of built heritage.

■ Architectural and Urban Trends explains the relationships between economic phases of development, cultures and urban morphology. It also covers the various town plans, urban shape archetypes and the different architectural trends.

■ Site Evaluation Methodology deals with research organization and the methodology for heritage studies in an interdisciplinary context. Students work in teams to prepare heritage cases (such as for the Westmount District in Montréal) to approach the Historic Sites and Monuments Board of Canada for recognition as a national historic district.

■ Professional Conservation invites professionals to present key projects which are then reviewed in detail. This course links theory with practice in the field of built heritage preservation.

The guided studies training is for students who have acquired this common knowledge base and have taken other optional and elective courses. Guided studies are seen as the best way to provide students with customized training on top of their initial education. It involves two three-credit studies and one six-credit study. Professor Marsan said that since students are allowed to choose their guided study topics (provided there is a professor to supervise that topic), they have the opportunity to update their initial education based on the expectations in preservation. Therefore, an urban planning student will favour urban preservation topics, whereas an architecture student will be more interested in buildings.

Students are encouraged to choose projects that deal with current issues. Professor Marsan has found that existing projects are more educational since they bring the student into contact with committed individuals and expose them to both opportunities and limitations.

This method, he said, can lead to employment opportunities while at the same time performing a service to society. Several preservation problems in Montréal and in Québec have been examined at low cost in this way and, in some cases, served as background studies for more advanced research and even for interventions. He cited the example of Gabriel Malo, a student who was interested in the heritage aspect of Montréal's subway stations. He now works for the Régie autonome des transports parisiens, a state-owned transportation board in Paris, and is responsible for developing a policy for promoting the cultural nature of certain subway stations in Paris.

The key educational problem in supervising guided studies (which often take the form of heritage studies) has to do with large variations in research preparation from one student to the next. This may be due to the nature of the student's initial education (an architecture graduate has less research training than a history graduate). To rectify this imbalance and prevent guiding instructors from having to repeat research technique training, a pilot seminar has been produced and launched this year (by Susan Bronson) to help students better organize their research. Students will now develop their required research reports while participating in the seminar activities.

In discussing theory and practice in the preservation of built heritage, Professor Marsan stated that most students in the PBE program choose the course path geared towards intervention. He said that because real-world limitations play an important role in the preservation of built heritage, several of the program's educational activities bring the students into contact with outside practitioners and scholars.

As administrator for the Professional Conservation course, he annually invites professionals who have carried out key conservation projects to talk to the students. As well, students do class presentations on theory and then do field work for practical experience. Among the field projects last autumn were the development of Montréal's International Quarter and the Lachine Canal, as well as architectural projects such as the

recycling of the former Central Post Office on Peel Street (one of the best examples of a curtain wall in the country) and the restoration of Ottawa's Library of Parliament.

Another type of educational activity that links theory with practice is the program's technical course. As part of an agreement with the Ordre des architectes du Québec (Quebec Association of Architects), which promotes ongoing training of its members, the PBE program includes an intensive three-day component involving professional practitioners. (This is in addition to its courses: Building Envelope Preservation, Masonry Preservation, Window Preservation and Roof Preservation.) These professional practitioners enrich the instruction given in these technical courses by providing students with real-world contact that would otherwise be very difficult to provide academically.

Finally, the practicum, although not mandatory, is still the recommended complement to the PBE training. This component is worth six credits, and the school and the practicum supervisor at a public or private enterprise must agree upon the training objectives. Not only do students prefer paid practicums, but they also ensure better mentoring on the part of the practicum supervisor. This has the added advantage of employment development in the field.

Professor Marsan said research is essential to the development of any program, but especially for one on the preservation of built heritage, which is constantly changing. Every professor must carry out research in parallel with his/her teaching, and this often involves students. In practice, however, this contribution is not always an adequate simulation — all the more reason for the development of a professional training program.

To further develop research in this field, the PBE program has created a two-phase strategy. The first phase was to apply for a chair in the federal government's recent introduction of the Research Chairs Program. The PBE program has now been granted a research chair in the Planning Faculty that is expected to be filled in 2004.

The second phase of the strategy will involve, among other things, developing relevant research topics, and attracting doctoral and post-doctoral students by accepting and paying those who agree to do their thesis or research on the proposed topics.

Professor Marsan finished by saying that the preservation of built heritage is a field in which universities have been virtually absent until recently, so the Université de Montréal's Planning Faculty was truly a pioneer in Canada when it developed its *Preservation of the Built Environment* program.

David Osborne then spoke about Algonquin College's Heritage Institute in Perth, Ontario, which has been teaching the basics of heritage carpentry and masonry since 1989. When starting out, he explained, the program received help from many people, particularly Doug Franklin from Heritage Canada (who is still on its advisory committee), Ann Faulkner from the Association of Preservation Technologists, and from the Ontario Heritage Foundation. Algonquin College tackled the development of a program unlike anything else being offered in Canada at the time. Even today, while many colleges in North America teach carpentry, few teach masonry and even fewer teach the basics of heritage carpentry and masonry.

The word *heritage* identifies the difference in Algonquin's approach to trades training, said Mr. Osborne. The students learn the traditional skills used in building construction throughout Canada's history. Hands-on training allows students to construct traditional timber-frame structures similar to those of early settlers. Traditional log buildings are constructed using a broad axe to hew the logs. One log building was recently installed in a local provincial park. Carpentry students also work in fine detail on projects such as entranceways, doors and windows.

Masonry students build in stone and brick using traditional methods as well as traditional mortars. They have actually built a lime-burning kiln, then gathered limestone from the region and burnt it to create their own lime mortar. In the masonry program, the students begin with

brick and block construction since this helps develop a basic skill competency that allows some of them to work on modern job sites. Then they are taught more traditional skills such as stone carving.

The Heritage Institute provides a broad perspective for both men and women wanting to work in the field of historic conservation and promotes a clear picture of why heritage conservation is so important in today's world. The program not only examines the traditional rationale behind the historic and architectural value of Canada's built environment, but also analyzes the economic, cultural and environmental advantages of conservation. For example, restoration generates employment while preserving local culture and enhancing the quality of life for local residents as well as visitors. Mr. Osborne noticed that students who build structures also learn the value of natural materials — and can appreciate the loss of existing materials, which are often cast aside or carted away to landfill sites.

The standards and guidelines of heritage conservation form the philosophical base of the Heritage Trades Program and are introduced at the very beginning of the first year. They are woven into the practical aspects of courses throughout the program rather than being treated in isolation as an academic exercise in a separate course. These standards and guidelines provide a vital framework for all practical training as well as academic studies throughout the program.

Once the in-house education and training are completed, the program's objective is to provide opportunities for students to apply their knowledge and skills in the community. Mr. Osborne proudly stated that students have tackled restoration and rehabilitation projects for non-profit groups, such as the restoration of a 1850s timber-frame agricultural hall in Almonte, Ontario. He said this project gave the students practical instruction while helping out a community. The students investigated the extent of damage to the building, determined what could be stabilized and what materials could be salvaged. They then replaced the sill plates, and

repaired or duplicated as much as possible of the siding (which was hidden under plywood) and the rotten window frames.

The masonry students are working on a project in Perth, Ingevall House — which is owned by the Ontario Heritage Foundation — where they are restoring the stone wall and an abutting privy. Their previous project was St. Declan's Catholic Church up the French Line in Lanark County. Built in the 1890s, the little church had a four-inch lean. When an engineering firm decided that the building was no longer serviceable and needed to come down, the small community of 15 families was devastated. It would cost an estimated \$85,000 to fix the church. Mr. Osborne recalled how the heritage trades students, in a two-week spurt, put this building back together. They straightened the frame building, put in cross-bracing, straightened out the top plates, and restored all of the windows.

Graduates find jobs in a wide variety of fields. Some accept positions with both small and large contractors, others become self-employed and often hire other Algonquin College graduates. Some do contract work for museums and various divisions of the federal department of public works. Each crop of graduating students spreads the word about the importance of conserving Canada's national heritage. Mr. Osborne then mentioned some specific graduates: Jason Gibson runs a firm specializing in timber framing, whose employees are all Algonquin College graduates; Tim Marshall is a masonry graduate working south of Ottawa, resetting and re-carving some of the details on a small church. Mark Bell and Mary Hodgins are undertaking a porch restoration in Almonte, Ontario. Nancy Clark is scaling on the West Block of Parliament Hill before it is re-pointed. Pat Murphy has a crew of Algonquin grads constructing a new building with traditional heritage characteristics.

Mr. Osborne considered Algonquin College fortunate to be part of the conservation training community. Over the years it has refined the curriculum, and as a result has enjoyed a certain success. He noted, however, that the program has limitations. The students are not masons or carpenters when they graduate, although they

do have the skills necessary to become good tradespeople with time and good guidance. There are some very good companies specializing in heritage conservation which employ masons and carpenters, and heritage trades students can learn a lot from them. Other companies also have very good tradespeople, but they lack an understanding of the conservation process. It would be useful, suggested Mr. Osborne, to get the graduates together with these employees.

On the Heritage Trades Program's wish list for the future is the development of guidelines for the establishment of a curriculum relevant to each trade. This standard, well-designed curriculum would ensure better quality tradespeople, and in its initial stages could be a springboard for more positive changes in the respective trades as a whole, said Mr. Osborne. A second wish would be the creation of a training centre for already qualified tradespeople who need to develop their skills and knowledge specifically for the heritage conservation field. Each of these projects would require an investment of time and effort from interested organizations. Mr. Osborne added that Algonquin College would assist anyone who wanted to develop the curriculum or create a training centre. He can be contacted at: osborned@algonquincollege.com

Robert Shipley then discussed the potential for jobs in the heritage field. Currently, he said, the job pool is limited for people who want to be involved as professionals and make their living in heritage conservation. He surmised that only about 20 people across the country work as community heritage planners, and estimated another 24 people work in various government departments, parks, ministries of heritage and culture, etc. An examination of the membership of the Canadian Association of Professional Heritage Consultants revealed that there are only about 100 in heritage consulting with engineering and architectural firms, or working with archaeologists or in the construction field.

In regard to training, Dr. Shipley said that there is no special program in English-speaking universities like the one in Québec outlined

by Professor Marsan. Other programs do exist, such as the heritage resource management course at the University of Calgary. However, it is preparing people to work not just in the built heritage field, but also as park managers and other related occupations. He said that some attention is paid to heritage in architecture programs, but little is specific to built heritage.

Again, in planning programs such as historical geography and the cultural management program at the University of Victoria, students are prepared not just for the built heritage conservation field, but also as museum managers and opera company managers. In addition, there are some public history programs in various universities. At the University of Waterloo, Dr. Shipley has tried to encourage administrators of the public history program to recommend that their students take his course in heritage planning, as it is a logical combination.

He suggested that Heritage Canada could help by developing "a kind of culture" for people who work in the heritage field. Unlike dentistry where one can go through school and walk into a recognized profession, the heritage worker has to be multi-disciplined, he said.

Dr. Shipley also commented on the tension between heritage entrepreneurs (such as consultants and tradespeople) and those who staff government positions relating to heritage. He remarked that the majority of people working in historic conservation are "buccaneers" who do what they have to do to make a living. He recommended more co-operation between educational programs dealing with heritage (universities are not necessarily better than colleges), and advocated combining the theoretical background from university with the practical application from college.

Finally, Dr. Shipley recommended that educators and others in the heritage field learn what educational and training programs are available across Canada so that they are able to direct students toward appropriate opportunities.

DISCUSSION/QUESTIONS

John McAuity (Executive Director, Canadian Museums Association) asked whether there might be a huge demand for experts to help private owners with restoration of their personal properties, and whether there is a need for a form of accreditation in training programs to ensure the public receives the right kind of expertise. He said that the misinformation or lack of information that often exists in the construction industry is critical.

Harold Kalman (B.C. Governor, Heritage Canada) responded that accreditation is something many organizations are wrestling with. The Canadian Association of Professional Heritage Consultants addressed the idea of accreditation 15 years ago, but then stopped because, he said, it was impossible to accredit such a range of professionals from museum staff and urban planners to historians and archaeologists. He added that under the Historic Places Initiative, registered buildings will have to be conserved according to set standards and guidelines in order to be certified and eligible for tax credits. Since this certification process is not certifying individual professionals but rather the quality of the work done, perhaps this will be the first step towards a seal of approval. He suggested that maybe a subsequent step will be to certify the individuals — architects, masons, carpenters and others — who are involved, and undertake some kind of standardization.

SESSION 3 :

Historic Places Initiative: Human Resources in the New Era

TOPIC:

“Your Dentist will be a Heritage Worker”: Historic Places Initiative. Return on investment rather than cultural resource management.



PRESENTER:

DR. CHRISTINA CAMERON,

Director General, National Historic Parks and Sites, Parks Canada Agency

Dr. Cameron explained the title by saying that, if the Historic Places Initiative (HPI) can be pulled together properly, then dentists may soon start to think about investing in heritage rather than just real estate.

Dr. Cameron began with a quick overview of the Historic Places Initiative. She then reviewed who works in the heritage sector (traditional heritage workers), who might work there in the future (non-traditional heritage workers), and who works in the non-governmental organizations (NGO) and voluntary sector. She concluded by considering some of the challenges and opportunities.

The Historic Places Initiative was begun in 1997 as a broad government initiative to support historic places and to foster “a culture of conservation.” The Initiative has two main thrusts: provide tools to encourage Canadians to conserve historic places, and protect historic places in federal jurisdictions.

Reasons why the Historic Places Initiative is needed:

- the loss of more than 20% of built heritage in the past 30 years;
- recent demolitions, fires, structural failures of National Historic Sites (recently burned Government House, Battleford, Sask., the Kettle Valley Railway trestles in the Myra Canyon, B.C. and St. John’s Anglican Church, Lunenburg, N.S.);
- chronic lack of co-ordination among different levels of government;
- no protection for archaeological resources on federal lands and weak protection through a policy for federal heritage buildings; and
- potential partners in heritage conservation have not been engaged by the federal government.

The main components of the HPI involve jurisdictions collaborating to enable a unified national effort; putting the federal house in order (there are 55 national historic sites in federal departments other than Parks Canada that have absolutely no protection); engaging Aboriginal communities who have different needs in this area but are very attached to place; fostering NGOs and the voluntary sector; and also creating tools to mobilize Canadians.

Included in the HPI tools are the Canadian Register of Historic Places, the Standards and Guidelines for the Conservation of Historic Places in Canada, the certification process and the financial support programs.

The Canadian Register of Historic Places is an instrument being built by all levels of government. Last March, said Dr. Cameron, the federal minister and the 13 provincial and territorial ministers responsible for culture and heritage unanimously endorsed the HPI and its tools.

The Register will determine what places will be eligible for financial incentives. The key components in the Register will be “statements of significance” and “character-defining elements.” This means that at designation time, the value of a place will determine its future interventions and what will be certified. These records will be made public on the Register’s Web site.

The Standards and Guidelines for the Conservation of Historic Places provide a nation-wide

benchmark of conservation principles and practices. They have been developed through a broad-based national working group from public, private and voluntary sectors, tested through 42 pilot projects, and are now ready for adoption by various jurisdictions. Dr. Cameron is trying to have them formally adopted as the standard for the works of Parks Canada. Essentially, they provide the basis for assessing conservation projects and appropriate interventions.

The Historic Places Certification Program is the accountability mechanism for financial incentive programs. If this is ever embedded into the fiscal framework, it will be dealt with through income tax reporting. An individual would submit to Revenue Canada a document of certification proving that preservation work had been carried out and that the project had met the required standards. This process would ensure that conservation projects meet eligibility and conservation requirements. The same process would be used for the \$30-million incentive program described below.

Currently, there are two incentives in place. One is the National Historic Sites cost-sharing program, which is targeted at not-for-profit owners of national historic sites. Dr. Cameron said this is a very good program, but there is little money in it. However, more funding is being sought from the federal government.

The second program is new: the Commercial Heritage Properties Incentive Fund. The \$30 million announced in the federal 2003 Budget will be used “to compensate businesses for a portion of the costs incurred in restoring heritage buildings.” It is only targeted at private-sector, incorporated, income-producing properties. To qualify, the building must be listed on the Register, and its conservation plan and work certified as meeting the standards.

Looking at human resources, Dr. Cameron said that the field has sort of invented itself. The momentum in heritage resource conservation began in the 1960s, she said, with the Fortress of Louisbourg reconstruction, which brought many specialists into Canada. The governments then began to acquire heritage property. Then the

Heritage Canada Foundation was created. The people involved developed into the traditional heritage worker. Now there is quite a good body of professionals, technical and trades people who regularly intervene in conservation work: historians, archaeologists, architects, engineers, conservators, curators, landscape designers, planners, masons, plasterers, carpenters, joiners, artisans, contractors and manufacturers.

Contrary to the assumption that many traditional heritage workers are about to retire, resulting in a loss of corporate memory, Dr. Cameron told delegates the succession has already started. Within Parks Canada, for example, some young, bright historians have recently been hired. However, she admitted that there is a concern that specialized skills and knowledge will not easily be replaced as experts reach retirement. Vulnerable areas are in historical research, marine archaeology and material culture research (56% of employees are over 50 years of age). Also, the data on three of the above groups shows that, for the 134 conservators and curators working across Canada for Parks Canada, 28% are eligible to retire in the next five years; of the 55 historians, 53% are eligible; and for the 54 archaeologists, 26% are eligible.

Looking into the future, Dr. Cameron cautioned that heritage conservation might lie in the hands of investors whose interest in heritage is not "public good" but profit. The Historic Places Initiative plans to introduce an "economic driver" into the heritage conservation equation. She said it is no longer enough to say heritage conservation is a good thing or the right thing to do; it has not attracted enough interest. The economic driver will create momentum, and probably some polarization between "public good" and "vested interests."

The changes she foresees include much more investment in heritage properties by the private sector. More critically for heritage advocates, heritage values will be contested and negotiated. Any prudent investor is going to want to be part of the review process for a statement of significance and character-defining elements, she said. There will no longer be a monopoly on heritage wisdom and knowledge. Professional

judgments will be challenged and, with NAFTA, U.S. expertise will be able to move into Canada and compete with Canadian conservationists. Dr. Cameron said she expects the changes will happen quickly because of the existing U.S. tax incentive model. However, it is not known how quickly the private sector in Canada will react.

Dr. Cameron explained that she formed this opinion partly by considering the U.S. model of federal tax credits and its heritage Register and certification system. Its program of allowing a 20% tax credit for certified costs is well integrated with state and local programs. More than \$30 billion in rehabilitation activity has occurred since 1976. This program, she said, has been sold to conservative and liberal governments on the basis of stimulating the economy and increasing employment.

In the future, she said, it seems there will be more investors than specialists. And this means there will be a different kind of heritage worker in the field. These non-traditional heritage workers who intervene in the fate of historic places include commercial bankers, tax credit professionals, accountants, lawyers, real estate agents, developers, entrepreneurs. The indications of this convergence of interest are already there, said Dr. Cameron, citing the U.S. National Park Service (NPS) as proof of this.

The NPS, she continued, provides good information on federal tax incentives; in partnership with the Internal Revenue Service, it offers training programs for developers which focus on the economics of historic development. Some training modules are on developer and investor equity, transaction structuring and tax credits, legislative updates, public-private partnerships, and new opportunities. For example, the NPS held a conference in Miami just for investors to suggest new opportunities for Miami Beach's post-1940s buildings. The investment approach is a different way of looking at heritage conservation from Canada's traditional viewpoint, she said.

Regarding the potential impact of NGOs and the voluntary sector, Dr. Cameron thought that

the voluntary sector could have a crucial role in the brokering of relationships and community facilitation, and in consensus building between investors and conservation advocates. They may also play a part in training responsibility (since they may have better access to some of the other investment groups), and in advocating to remove legal and regulatory barriers.

Next, Dr. Cameron discussed how the U.S. National Trust for Historic Preservation, which is a similar group to the Heritage Canada Foundation, is trying to bridge the gap. Its Web site provides information on easements, financial assistance, government and legal policies. The Trust also produces *Preservation Law Reporter* (since 1982) through its law department, which also tracks the legal cases and their effect on certification and building code issues. It also offers training in partnership with the American Bar Association on historic preservation laws, tax law, real estate law, and litigation issues. She added that Heritage Canada does not have a law department at this stage, but may need one at some point.

Dr. Cameron returned to the topic of upgrading skills, saying that traditional heritage workers may have to upgrade so as to withstand challenges and meet certification standards. They will need to acquire new skills (facilitation, negotiation and communication) and new areas of knowledge (fiscal and regulatory regimes). It is also an opportunity for private sector and construction industry workers to upgrade their skills.

The heritage community with all its know-how can have a true leadership role in influencing those who intervene/invest in historic places, she insisted, as long as the thrust to move heritage conservation into the mainstream is mapped out clearly. She challenged delegates to reach out to new partners, and act as a bridge between heritage good and profit motive. However, the downside of this is that control of heritage will have to be shared, and conservation advocates will have to justify their professional points of view over standards and guidelines.

In conclusion, Dr. Cameron said that heritage conservation is going mainstream and the heritage

community will need enhanced skills and knowledge to influence dynamic partners in heritage activities. In short, she told delegates, your dentist will be a heritage worker!

DISCUSSION/QUESTIONS

Pamela Madoff (City Councillor, Victoria) asked whether municipalities would be considered as non-profit heritage property owners on the national register and therefore be eligible for financial assistance.

Dr. Cameron replied that Parks Canada already has cost-sharing agreements with municipalities. The new HPI incentive targets income-producing properties, while the cost-sharing agreements are for those that are not income-producing. She said that 70 to 80 cost-sharing agreements for national historic sites have been drawn up with municipalities.

Steve Barber (Heritage Planner, City of Victoria) commented that Dr. Cameron sounded terribly optimistic and asked if she knew something that the delegates didn't know.

Dr. Cameron said the reason for her optimism was that there has been so much progress on HPI. Besides all the jurisdictions coming together to build the Register, there are now provincial registrars working on the software, and people are trying to meet the documentation standards to start filling in the Register. The conservation standards are also ready. In short, the heritage homework is being done, but it will still require some political pushing to get governments to invest in heritage conservation.

Nick Bawlf (architect, Victoria) asked whether the federal heritage properties included the National Defence properties because Victoria has several defence establishments that contain a number of heritage buildings such as the dockyard in Esquimalt.

Dr. Cameron informed him that National Defence buildings do come under the jurisdiction. She explained that the current standing for DND or any other federal department is that if there

is a national historic site on their property, there are no restrictions. Federal heritage building standards and guidelines have to be followed for maintenance even for a "recognized" or lower level federal heritage building. If the department has a "classified" or higher level federal heritage building, there are some things, such as reviewing the plans, that must be done before any changes happen, but there are no restrictions. Dr. Cameron said this is one of the gaps being looked at when she refers to "getting the federal house in order."

Allan Parish (Heritage Trust of Nova Scotia) wanted to know when and how the \$30 million mentioned in the 2003 Budget would be distributed.

Dr. Cameron replied that the criteria for the Commercial Heritage Properties Incentive Fund are being designed and then must be presented to Treasury Board to have the money released. She hopes to have the first call for proposals in spring 2004, however, the terms and conditions must first be approved by Treasury Board. She explained that if someone has an income-producing property that qualifies for the Register, then once the incentive program is up and running, a proposal could be submitted for financial consideration.

Odile Roy (City Councillor, Québec City) said she found it encouraging for the conservation movement that the federal government is putting up money for heritage properties. She added that the heritage conservation movement has to be more like the environmental movement and point out its economic benefits.

Harold Kalman (B.C. Governor, Heritage Canada) thought Dr. Cameron's "crystal ball gazing" was superb, although only hindsight would tell whether she is right or wrong. Unfortunately, since the new incentive program is only for corporately owned revenue properties eligible for support, it is just a drop in the bucket, and he feared that only about 2% of the registered building stock in Saint John would qualify. He also asked when there might be a new Historic Places Act.

Dr. Cameron responded that if the program takes off, that 2% will go up. She expects people

who never had any interest in heritage property will come forward and want to be designated. She thought the whole designation process would also change.

Harold Kalman countered that this would still only affect the commercial sector.

Dr. Cameron allowed that the federal level cannot reach Joe and Jane Homeowner anyway, unless it is a nationally significant property. There are provinces and municipal programs, such as Victoria's, that are doing a good job on incentives. Dr. Cameron said she didn't know when there would be a Historic Places Act, but estimated that it would take another 18 months.

Harold Kalman asked if it would be possible to keep the momentum going without the Act.

Dr. Cameron reassured delegates that an act is not needed for the Canadian Register of Historic Places to function as it can be achieved through policy. She said the Standards and Guidelines could be adopted as a policy decision as well.

Julie MacDonald (Heritage Consultant, Vancouver) queried whether the Register would be part of a database or be a database itself. She said municipalities are telling heritage consultants that no database has been designed.

Dr. Cameron said that the database software does now exist and things are on track.

Kristen Verin-Treusch (Mnddy Waters Walking Tours, Winnipeg) asked what Heritage Canada and other organizations are doing to disseminate information to undergraduates to encourage them to train for heritage jobs. She wished to know where students could find information about potential heritage careers.

Dr. Cameron replied that when Parks Canada was recently looking for new historians, it put the announcement up on its Web site for three days and received more than 300 applicants.

Brian Anthony (Executive Director, Heritage Canada) explained some of the Heritage Canada Foundation's educational activities and plans.

Each year, Heritage Canada publishes an edukit designated for primary schools and distributes some 40,000 copies across the country. There is also a youth page on the Heritage Canada Web site that provides a self-guided tour of the same material. These initiatives help sensitize younger people at the earlier stages of their education.

He added that for years in a limited way, Heritage Canada has been involving undergraduates, graduates and post-graduates doing both co-op and practicum work and even volunteer work within Heritage Canada. There are currently two students, one paid and one volunteer, working at Heritage Canada's headquarters in Ottawa. A third student, a Parisian studying at the University of Ottawa who found Heritage Canada on the Web, will also begin volunteer work soon.

Now that Heritage Canada has a listing of heritage training courses and educational programs, it is developing an interactive relationship with faculties and staff in the heritage area. Mr. Anthony said this is another way to develop opportunities.

Finally, Heritage Canada administers a fairly large chunk of the Young Canada Works fund — about \$5 million over the last few years. This year, Heritage Canada has put 90 young Canadians to work in heritage organizations and institutions across Canada in career-related, on-the-job experiences. If Heritage Canada had even half as much money as the demand required, it could be spending two, three or four times as much Young Canada Works money. The demand is high, he said, on the part of both young people and institutions. There are some great opportunities here to expand Heritage Canada's activities at the post-secondary level and beyond. This conference is certainly an indication of Heritage Canada's commitment to do so.

Trudy Cowan (Alberta Governor, Heritage Canada) expressed her concern about the many levels of jurisdiction that either do or do not protect buildings. At the national level, she said, there is no protection for designated national historic sites, except heritage railway stations. There is a move to try to gain some protection for lighthouses, and potentially for grain elevators

because of jurisdictional problems with this particular category of buildings. She asked whether railway stations (which have protection, but are still owned by profit-making railway companies) will be on the Register and be eligible for tax incentives.

Dr. Cameron said that the Canadian Register system allows each jurisdiction to submit properties that meet the documentation standards and have been designated by a competent authority within a recognized designation process. Because the *Heritage Railways Stations Act* has carried out federal designations on railway stations, the federal government will put those on the Register. If these Register railway stations are privately owned, then yes, they would be eligible, she said.

Dr. Cameron added that for the cost sharing for non-profit heritage buildings, the terms and conditions of the program have been renewed. This means that any national historic site not federally owned is eligible for one of four different kinds of support related to conservation, planning, and interpretation. The only part missing, she said, was for Treasury Board to put some money into the program.

Gordon Nelson (Ontario Governor, Heritage Canada) said that historic places are more than buildings as they include cultural landscapes, and asked whether the Register would have anything for landscapes. He said that in the U.S., there are national heritage landscapes in its legislation.

Dr. Cameron asserted that the term in the Canadian Register of Historic Places is deliberately defined broadly in order to include cultural landscapes as well as archaeological sites. She also said that the incentive program is for cultural properties, not buildings.

Jim Bezanson (Chair and N.B. Governor, Heritage Canada) asked whether the program would be expanded beyond incorporated property owners.

Dr. Cameron said not at this time since the program is just beginning and it is important to

be very clear on how it will unfold. First, there must be proof that the program will work, then later on an argument can be made to expand it.

John McAvity (Executive Director, Canadian Museums Association) congratulated Dr. Cameron for her perseverance and passion for heritage. He then asked if there was a difference between eligibility to be designated for the Register and eligibility for the financial incentive.

Dr. Cameron explained that the Register is set apart from an individual financial support program. However, a property must be on the Register to qualify for certain incentives. The Register will first include all those properties already designated (about 20,000) and that may take four or five years. In the meantime, new properties will be designated, she said.

SESSION 4 :

Industry Speaks

TOPIC: Building Tomorrow's Workforce



PRESENTERS: J. TIMOTHY FLOOD,

President, John Flood and Sons (1961) Limited,
Saint John, New Brunswick



GEORGE GRIZIOTIS,

Executive Director, Construction Sector Council

Timothy Flood, who serves as a business Co-Chair to the Construction Sector Council and to the Organized Construction Alliance, is also the current Chair of the Canadian Construction Association's Human Resource Committee. He spoke to delegates as a representative of the organized or unionized side of the construction industry.

Mr. Flood provided some background on the construction industry, saying it is one of Canada's largest and most valuable sectors. It accounts for more than \$130 billion, or approximately 13% of the nation's Gross Domestic Product. The industry employs a wide variety of tech-

nologies in three major sub-sectors: residential, non-residential and engineering construction. He explained that all three are quite distinct, respond to different market forces and demands, use different techniques and materials, and employ different labour forces.

Residential construction includes dwellings from single-family homes to large apartment buildings. Institutional, commercial and industrial construction encompasses all buildings that are not residential, such as medical and educational facilities, offices, stores, hotels, plants and warehouses. Engineering construction, the third market, covers all non-building construction, such as roads, sewers, bridges, dams, railways, ports, airports, pipelines and oil and gas facilities.

The construction industry, though large, is highly fragmented. Most firms are small, independent, widely dispersed regional and local companies. The industry comprises more than 20,000 general contractors and more than 108,000 trade contractors, with 80% having revenues of less than \$500,000. Approximately 90% employ fewer than 20 workers.

The market for construction is extremely cyclical, subject to massive and unpredictable swings of demand. However, the industry has evolved into one that has adapted to operating successfully in a feast-or-famine market environment.

Mr. Flood emphasized that construction has a strong local presence. Construction is a site-specific activity, requiring hands-on management and knowledge of local labour conditions and regulations. Non-tariff barriers have also reinforced this need to be located in just one region.

Statistically, the construction industry is almost 100% Canadian owned. Altogether it employs 944,000 workers, according to the most recent monthly labour force survey. This represents just over 6% of total Canadian employment. Of these workers, 59% are concentrated in the construction trades, followed by management at 17% and clerical at 9%.

Unionization levels in the industry vary by province and by sector. Provincially, the overall levels

may be as low as 25% in British Columbia and as high as 100% in Quebec. Unionization is also higher in the ICI sector (institutional, commercial, industrial) than in residential work. Outside of Quebec and the city of Toronto, the residential sector operates in an almost totally non-union environment.

Construction unions are for the most part international in scope, operating primarily in the U.S. and Canada. Mr. Flood stated that, given the structure, characteristics and volatility of construction — and, more importantly, the size of the majority of contractors engaged in the industry — it is unreasonable to expect that individual firms will have developed significant programs aimed at trades training. Indeed, the majority of contractors outside of the organized sector offer little or no trades training.

Training however, is of paramount importance to the unionized construction industry, continued Mr. Flood. In the organized sector, contractors and labour unions have formed partnerships to deal with the many issues that individual contractors cannot possibly undertake (including multi-employer benefit and pension plans). The unionized sector has long been aware that the smooth functioning of the Canadian construction industry is highly dependent on the continued supply of a highly skilled, productive, safe and efficient workforce that is both geographically and occupationally mobile.

Mr. Flood suggested that the construction training and upgrading program could be used as a model by other industries. Estimates reported in a recent survey of union training centres indicate that more than 58,000 workers registered in more than 200 training facilities in 2,800 courses during 2001-02. This training is supported by 1,400 staff and instructors, and it is related to the apprenticeship programs across Canada. Some 88,000 apprentices are registered in the system, and they are in school or on the job, he explained.

This training system represents a major strategic advantage enjoyed by the unionized sector, and it is the most important source of training for skilled construction workers, Mr. Flood stated.

It is a leader in the management of Canada's skilled construction workforce and a crucial partner with government in making policy in this area. In particular, the labour and employer partnership is the most important player in solving the high-profile issues around skills shortages.

Mr. Flood said that the Canadian industry believes in the economies of scale that come from its association with the international construction unions. For example, the \$22-million Train the Trainer Centre of the United Brotherhood of Carpenters has a \$100-million annual training budget, 1,500 full-time instructors and 250 programs across North America.

The survey of union training centres estimates that apprenticeship training is equally divided between upgrade courses for apprentices and the regular in-school portion of provincial programs. These estimates show that at least one-third of the organized construction workforce is enrolled in training. These results, as Mr. Flood pointed out, imply that, contrary to popular opinion, the organized construction sector is a leader in training in Canada.

For example, the *Achieving Excellence: investing in people and knowledge and opportunity* paper released by Industry Canada as part of its innovation initiative noted that Canada lags behind other nations in the proportion of adults in employer-sponsored training. However, the survey of union training centres showed that the organized construction sector has at least matched Canada's overall performance in this area and provides important leadership, not only for other sectors of the construction industry, but also for other industries.

Of the 2,800 courses and programs identified in the survey, one-third were described as trades training and focused on short-term sessions on new building materials and equipment methods. A further 25% of the courses were apprenticeships — either short sessions to enhance the regular provincial program or longer, formal in-school sessions required at each level of the program. The third-largest category of training was health and safety, where 17% of the training was offered. Survey results and related research

indicate that this is only a portion of the total health and safety training available to construction workers. There are also many courses, some compulsory, offered by provincial organizations that are often affiliated with the Workers Compensation Boards.

The survey indicated that 66% of the training programs were less than one week in duration. The balance of these courses, running from 2 to 10 weeks, included apprenticeship in-school sessions. Mr. Flood said that this focus on short-term training is distinct from that of the community colleges (where training opportunities tend to be longer) and is aimed more at individuals coming out of secondary schools than at the existing workforce. There is heavy emphasis on the practical training with just one-third of the training programs limited to only theoretical matters. Forty percent of the courses devote more than half of the available time to practical hands-on training. Half of the training opportunities are delivered in the classroom, while 40% combine time in class with shop or other hands-on activities. A further 10% of the training is delivered in a computer-related format. He said that a focus on re-creating job site circumstances is a priority when investing in facilities and equipment. Across Canada, approximately \$100 million have been invested in facilities and equipment to date.

While Mr. Flood could not provide figures on how much money is spent on training in the organized sector in Canada, he said that the essential message is that the training can be provided in many ways. Very different combinations of facilities and equipment are needed to replicate working conditions for each trade, he explained. However, there is some consistency to the funding that comes out of training trusts that draw income from hourly training contributions. These rates are applied in most trades and training centres and the rates vary from 10 to 45 cents an hour, with an industry average of 22 cents an hour. The contribution rate applied in Quebec is 20 cents.

The labour market information available through the Quebec Construction Commission notes that, during 2001, there were about 91 million

man-hours reported in the province. This means about \$18.2 million from the unionized industry were made available for training in that province alone, he said.

Mr. Flood explained that since training is a joint initiative of both the employer and the unions, it is not surprising that much of the training is designed to meet the needs of contractors who employ the unionized workers. As such, considerable training is directed at familiarizing the workforce with new materials, methods and technologies.

Canadians, he said, live in a time of rapid change, and for Canadian companies to maintain their cutting edge, they require the most modern and efficient facilities possible. The unionized workers of the nation's largest industry — and the contractors who employ them — must have the skills to install the most recent innovations in construction methods, materials and technologies. The speaker was confident that the trades training partnership helps provide those skills.

Mr. Flood recognized the need for skilled craftspeople in the area of built heritage preservation. In the effort to preserve Canada's threatened buildings, it is necessary, he said, to rely heavily not only on preservation professions, but also on master tradespeople with extensive knowledge and years of practice in a particular craft. There is a concern that it is difficult to find experienced craftsmen for specific jobs, and he acknowledged that the unionized construction sector has not invested heavily in this area of residential construction.

The Heritage Canada report indicates that there are 128,000 residential properties requiring ongoing maintenance, which suggests there is an unmet demand for staff with heritage skills in both the trades and professions, said Mr. Flood. Given that this sector relies almost entirely upon community colleges and the public purse to provide and fund training, it should not be surprising that the report identifies only two community colleges in the country that are able to offer any quality training in this area. Also, he said, the training in the organized sector

is primarily intended to meet the needs of the contractors who fund it. Logically then, that training is directed more towards new materials and technologies required in the ICI sector and less at the built heritage work, which is primarily residential.

Mr. Flood believes that apprenticeship training in Canada must mean apprenticeship in its pure form. Training in built heritage will be an important add-on to conventional apprenticeship training. He warned delegates of supporters of apprenticeship schemes that lead to the “de-skilling” of the trades. The way to produce the best and most highly skilled tradespeople is to ensure that they are trained in the full spectrum of the trades, he said.

In addition to training, Mr. Flood said, the mobility of such a skilled workforce should be promoted. Certification of trades would go a long way to support inter-provincial work. Mobility of workers would help alleviate labour supply problems. He suggested measures such as special tax provisions for both employees and employers, mobility assistance programs to help employees defray the costs associated with temporary relocation, common core training and the removal of inter-provincial restrictions, and facilitation of the north-south flow of workers. The unionized sector supports initiatives that provide the retention of skills, certification and a mentoring on-the-job program, where 80% of skill development takes place, he stated. And, he said, there are unionized joint training and apprenticeship committees capable of delivering the sort of training required.

There are other issues related to skills shortages that are not necessarily resolved at the training centre level. Many of these require a broader industry approach. For example, Mr. Flood said that the unionized sector has long been aware of the need to promote construction trades as a career choice, and to address other industry human resource issues. The trades are good careers, they offer well-paying jobs. Good tradespeople evolve into entrepreneurs, but young, bright people first must be steered there, he said.

In the year 2000, the labour and management

partnership put into place an appropriate forum to tackle some of the industry concerns. With financial assistance from Human Resource Development Canada and \$100,000 raised solely from the organized sector, the Construction Sector Council came into existence. The work of the Council has been growing in leaps and bounds, and it is truly evolving into an organization that undertakes work on behalf of the entire construction industry, both union and non-union.

Mr. Flood invited Heritage Canada, the built heritage community and the Canadian Home Builders Association to work with the Construction Sector Council to identify built heritage needs, and the approaches and programs required to address them.

George Gritziotis, Executive Director of the Construction Sector Council (CSC), said that the questions asked in Heritage Canada’s *Human Resource Issues* report (Where will the workers come from to do built heritage restoration across Canada? How can these trades be promoted to youth?) are the same ones the CSC is dealing with. The CSC has accordingly been positioning itself almost as the human resources department for the industry, and is already promoting such trades as boilermaker, operating engineer and sheet metal worker, and could also do the same for the specialty trades involved in restoration of heritage buildings.

It is a challenge to find the right workers to do these trades, Mr. Gritziotis admitted. The highly technical nature of heritage work means that many of the painters and carpenters are brought into the country to do the work. He acknowledged that Canada does not have a lot of home-grown talent whose skills can be transferred to a future workforce. Yet, shortages are not unique to any particular group and present a challenge for the construction industry as a whole.

Before the Construction Sector Council was set up, industry owners, labour unions, non-union contractors, public sector owners and private sector owners were consulted to discover the outstanding labour market issues. Many of those issues match the concerns of Heritage Canada:

an aging workforce, labour shortages/surpluses in a cyclical market, the need to move workers across the country seamlessly (i.e. with recognized skill sets or national certification), and co-ordination with the provinces whose apprenticeship training programs develop those skills. He said that from a policy point of view, the apprenticeship training program must respond to the needs of the industry, including the need for heritage restoration workers.

Another issue Mr. Gritziotis mentioned was the negative image of the trades, and the difficulty in attracting and retaining youth. He said it was ironic how in the past few years young people jumped on the high-tech bandwagon as a career choice, only to see it falter. At the same time, the construction industry was booming, yet it struggled to convince the community colleges to put appropriate courses in place. Many universities offer a high-tech MBA, but there is no such thing as a construction MBA.

Mr. Gritziotis said the construction industry requires highly specialized skills as much as the IT industry, and cited as an example the complexity of the design and construction of the Confederation Bridge to Prince Edward Island. The construction industry also struggled to get the government to look at construction from a national perspective, but there is still no policy at Industry Canada that deals with the construction economy as opposed to the knowledge economy. On the other hand, he admitted that the industry has not done a good job of attracting and retaining youth and knows that its recruitment strategies are not working very well.

The speaker then listed the Construction Sector Council’s five strategic priorities:

- promoting apprenticeship training
- advancing career and workforce training
- expanding partnerships
- improving recruitment and retention of youth
- providing better labour market information and conducting research

The Council, he explained, wants to become a leader in providing labour market information, career awareness, learning technologies, and

standards and skills development. He said that by providing better information and research on the demand for skilled labour, industry and governments will be better able to identify human resource needs based on objective data. This will enable them to develop targeted human resource solutions, identify needed products and services, and support labour market policy making.

The Labour Market Information Program is at the heart of the CSC's work plan, he said. It is looking at labour supply/demand forecasts for each trade, sector and region, as well as at labour mobility and local labour market efficiencies. It will research and analyze the future labour supply needs, the impact of technology on skills, training infrastructure and trends in management. It also intends to look at the serious impact of the underground economy on human resources.

The CSC plans to improve the image of the construction industry and to promote the construction trades as a viable career, Mr. Gritziotis continued. This will be achieved by identifying shortages by trade and region through Labour Market Information, then working with key construction trade groups to develop an information strategy for target audiences. For example, there is currently a campaign to encourage Aboriginal youth to enter the ironworker trade as demand there will soon exceed supply. Although school dropout rates amongst Aboriginal students are high, the ironworker trade has had a long and good relationship with Aboriginal people, he said, noting that Aboriginal youth are also the fastest-growing segment of Canada's labour pool.

The CSC intends to promote learning technologies too, because they can reduce the time and cost of training while making training continuously available and accessible from anywhere in Canada. In addition they will help enhance the quality of training and eliminate duplication of training effort. The industry already uses a computer-based health and safety training program for pipeline construction, and e-learning platforms are available for existing certification and accreditation programs through the Canadian Construction Association.

Finally, in the area of standards and skills development, the goals would be to enhance worker mobility, eliminate barriers to mobility and promote Red Seal (national standards) certification. The Construction Sector Council intends to collaborate with construction groups, Sector Councils, the Canadian Apprenticeship Forum and government departments to make these goals possible, declared Mr. Gritziotis.

SESSION 5 :

Lesson from Afar: The United Kingdom

TOPIC:

How the National Trust in the United Kingdom has changed to tackle human resources issues.



PRESENTER: PAUL BONIFACE,

Director, Human Resources and Legal Services, National Trust

Paul Boniface gave an overview of the National Trust organization's heritage management and key human resource challenges in the United Kingdom. He then described the massive program of change the National Trust has undergone to equip itself for the future.

Broadly speaking, he began, the National Trust manages heritage between the public sector and the not-for-profit or charitable organizations. The government is responsible for providing philosophical direction. The current government issued *The Meaning and Value of Heritage*, which was the first important statement on the future of heritage in the U.K. Since then, further papers have drawn attention to the importance of human resources.

The government is also the primary source of funding. Within the National Lottery Fund, there is a heritage lottery fund, which is an important source for many of the National Trust's activities. However, there are some indications that this heritage fund may be opened up to other worthy organizations in other sectors. The National Trust also works closely with English Heritage to identify sources of funding for particular projects, besides having its own property portfolio.

The Trust is the biggest of the U.K.'s conservation charities.

Mr. Boniface explained that although the National Trust is thriving as an organization, it has competition, not just from English Heritage or other private estates, but also from time itself. Because of longer working hours, people don't have the time to visit heritage properties, he said. As well, heritage sites have to compete with people's time on the Internet, at sporting events and other cultural activities. There is also the matter of competing for money with other government priorities such as health and education. When times get tough, the National Trust's government funding gets tight.

Certain staff groups are extremely hard to find. For example, currently there are national shortages of building surveyors and rural surveyors. Even when they are available, as a not-for-profit organization, the National Trust cannot afford them.

The difficulty in finding out the number of people working in the heritage sector has been a catalyst within the National Trust for it to gather statistical data so that it can better understand where the skills shortages are and where they are predicted to be in the future.

The British government has some plans which are intended to develop employment in certain areas, particularly for the young. Most of these schemes, though, are not sophisticated enough to pick up particular skill needs within heritage management, Mr. Boniface said. The National Trust now has a five-year workforce plan, which will be used to determine what human resource skills will be needed – be it stonemasonry or thatching. This information can then be presented to the government to influence its human resource development programs around certain professions, he explained.

BACKGROUND

Mr. Boniface told delegates that the history of the National Trust is one of great success and fantastic growth. Three visionary Victorians with a background in Christian socialist thinking created the National Trust in 1895. One of its

founders wanted to ensure the preservation of outdoor places for the poor. The *National Trust Act* was put through Parliament in 1907, and its mission statement continues to be both practical and purposeful, he declared.

Its first heritage property was bought at the turn of the 20th century for a mere £10. The National Trust now has 200 historic houses and gardens, and almost 50 industrial settings. It is also the second biggest landowner in the U.K., including 600 miles (1,000 km) of coastline. The Trust also has the power of inalienability — which is a unique authority, added Mr. Boniface. If land, or a building or estate is bequeathed, the National Trust can declare it inalienable. This means it is totally protected unless there is a statutory change in Parliament for that given property. While this power is invaluable, it is only used sparingly, he stressed.

The Trust employs almost 4,400 staff all year and a further 4,000 during the summer months. Remarkably, there are also more than 40,000 volunteers who support the National Trust in its work, which Mr. Boniface calculated is roughly equivalent to 1,500 full-time staff. He said the National Trust also has an amazing membership of 3.2 million, which is bigger than the population of Wales. However, because of this, the National Trust lives in the public eye and how it treats staff and volunteers is very important.

The National Trust has a conservation department, historic properties department, land-use department of rural surveyors and foresters, conservators, curators, archaeologists, a small group of environmental practitioners, administrative staff, and now a group of trainees learning from this staff. About two-thirds of the staff work in operational management at the properties. Mr. Boniface stated that much of his time is spent trying to develop the relationships between the operational people and the specialists.

The National Trust's income is now about £3.4 million, but that is only just breaking even. Despite its successes, he said, by the year 2000 the staff was increasingly frustrated by its slow decision-making process and its predominantly inward-looking approach to conservation.

Entering the 21st century, the National Trust realized it was still doing what it had done in 1895, only doing it better and on a bigger scale.

The pressures on the National Trust are different now, Mr. Boniface said. There are very difficult economic problems within the agricultural industry, the land is at threat, there is congestion and pollution in the country, and the National Trust could be using its power more wisely. He admitted that the prevailing view amongst staff and the Trust's management was that change was needed to develop the organization's internal efficiency and external impact.

So the National Trust looked at its core work and asked whether it was doing the right things. With its own board members and staff, it developed some new priorities. The principal activity, which must continue, is the management of the heritage property portfolio. It also identified a need for conservation services, customer services (formerly called supporter services) and corporate services (human resources, legal services, information technology, finance).

Those new priorities included developing an ability to influence external bodies — especially government ministers and senior civil servants — on matters such as agricultural policy, transport development and media communications, and developing an ability to generate policy statements on particular issues.

CHANGES

One of the major changes the Trust undertook was to restructure itself into three territories that administer 11 regions. This was reduced from 15 regions so that the new boundaries would coincide with local government boundaries. In addition to influencing national government, said Mr. Boniface, it needs to influence local government.

The second key element of the Change Program, he continued, has been the creation of the Directorate of Conservation. This development brought together the previously separate functions of looking after the inside of historic properties and maintaining the estates (which was mainly concerned with the outside landscape).

Keeping the distinction between the built and natural environments was deemed unnecessary. The new directorate ensures that the National Trust's hundreds of properties receive an increasingly holistic service from its conservation experts.

The Trust also re-organized its customer services and created a new function for policy and strategy that will be more outward-looking. Mr. Boniface remarked that the new top structure was very different from before, when it was far less representative of the regions.

In the second phase of its Change Program, the National Trust focused on human resources, and how best to redesign jobs and deploy staff to complement these major changes. The result was dramatic changes in the human resource management of the National Trust designed by its own staff. Two hundred new job descriptions were developed affecting more than 1,300 staff, many of whom have moved into entirely new roles. For example, there are now policy people in each region to influence local government, as well as grants offices which look for local financial sources. There are also donor-development people, who are part of customer services and who look within the region for potential donors to the organization.

An important change has been the development of training and education opportunities for professional staff — opportunities to satisfy self-development, but also to ensure the National Trust possesses the skills it requires for the future. As part of its five-year plan, proposals are now being considered for education and training.

The National Trust already runs its own three-year apprenticeship training program for gardeners and forestry wardens because it is considered "the" place to be trained and employed. The National Trust "brand" attracts good people. In a recent recruitment for gardeners, there were 600 applications for 20 places. The problem now, said Mr. Boniface, is to retain the gardeners once they are trained because they have good qualifications from a name organization. However, this responsibility is good for the National Trust and is a benefit to the nation.

The organization is also trying new approaches to filling the skills gaps beyond apprenticeship. Many new jobs have been designed so that some of the traditional roles are no longer bound up with a lot of administrative work. The National Trust has also tried different pay systems to gain the flexibility needed to hire workers in certain parts of the U.K., as it has to compete with the private sector.

Mr. Boniface added that the National Trust has embraced what it calls a sustainable workforce strategy, by applying the concept of sustainability to human resources management. Admitting that the organization, as a charity, will never be able to pay staff high wages, he pointed out that it can provide other things such as more flexible hours, different shift systems, and more purposeful work. By getting the balance right between work and non-work activities, it will improve recruitment and retain its staff. Mr. Boniface said that the National Trust is as much about people as it is about property, and that focusing on human resources is essential for excellence in conservation.

The next step, he told delegates, is to consolidate this new structure, and reviews will be ongoing over the next few years to see what works and what needs some tweaking. He said the National Trust is also emphasizing behavioural change in how the organization works on a day-to-day basis. It has embarked on a program called One Trust — Working Better Together, in which a series of values are promoted based on the original 1895 mission statement. In brief, it is about being less risk-concerned and more tolerant of mavericks and eccentricity within the Trust, and about taking pride in everything in the organization. As part of this program, every staff member has spent some time with their colleagues, including the gardeners and caterers, wardens and foresters to discuss how to take the success story of the National Trust further into the 21st century. The difficult part, he said, is to preserve all the wonderful things the National Trust stands for while it changes. He acknowledged that the change over the past few years has been difficult at times, but said the organization has now entered a stable period. The expected benefits are starting to show too.

as the organization's income is improving and its conservation index is showing some positive signs as well.

DISCUSSION/QUESTIONS

George Chalker (Newfoundland and Labrador Governor, Heritage Canada) asked Mr. Boniface to elaborate on the National Trust courses offered to the public.

Paul Boniface said the organization invites people to its master classes in a particular field of conservation as an educational service. He added there are also working holidays or "busman's holidays" when participants are taken out to its properties across the United Kingdom to live under basic conditions and perform tasks such as path building.

Nicole Verin-Treusch (Muddy Water Tours, Winnipeg) was curious about the difference between the National Trust and the one in Scotland.

Paul Boniface explained that for historical reasons the National Trust of Scotland is a separate organization, but that the National Trust works closely with it. It has membership on the National Trust's board and vice-versa. The Scottish portfolio of properties is more about the land than buildings, he added.

David Dueck (incoming Manitoba Governor, Heritage Canada) asked how important the trustees were on the National Trust and if they drove the programs.

Paul Boniface replied that the staff reorganization led to a review of the trustee side by volunteer third-party experts in corporate governance. The result is that the current structure will be changing since it is very complex and not necessarily very efficient. Currently, there are 52 trustees, and it is difficult to get agreement. Half are voted in at the annual general meeting, and specific bodies such as the Victorian Society or the Ramblers Association appoint the other half. The review recommended a much smaller group of 12 as the governing body, with a larger group behind them meeting less regularly who will be

"the conscience" of the National Trust. He said this change would take place in 2005.

Robert Shipley (University of Waterloo) wished to know whether a national heritage organization could be effective without actually having ownership or control of properties, and if the speaker had any advice for Heritage Canada.

Paul Boniface admitted that the National Trust has influence and profile because of its properties. Even so, there are sister organizations that do not have properties which set themselves up as pressure groups on government. Mr. Boniface thought Heritage Canada could make a difference if it went in that direction. However, he cautioned that this would require professional lobbyists and policy developers who can network and be heard at the relevant tables. It would also require professional money-making plans, professional legacy developers and marketers.

Steve Barber (Heritage Planner, City of Victoria) said there have been some recent insurance changes in Canada so that homes with heritage designation have been refused insurance policies. He asked what the situation was in the U.K.

Paul Boniface answered that in the National Trust, buildings are insured but not their contents. He said the insurance costs have risen about £500,000 in the last year. There has been no difficulty to date in getting insurance for the heritage properties, but the Trust has insurance experts on staff to make sure its properties are covered.

Gordon Nelson (Ontario Governor, Heritage Canada) asked what kind of volunteer and training opportunities were available for young people.

Paul Boniface said volunteering is seen as a service the National Trust provides and primarily involves people working on their local property rather than contributing to the national organization. There are many training opportunities for all volunteers, he said, but there are not enough young people in the volunteer group. Most are over 65. However, there are more young people involved on the staffing side and the National Trust is appealing to younger groups through

direct marketing. Mr. Boniface said he couldn't answer the question properly, because the National Trust has not yet done enough to create a framework in this area.

Pamela Madoff (Councillor, City of Victoria) queried whether the listing or designating of a heritage property in the U.K. requires the permission of the owner, and what level of government is responsible for listing a heritage property.

Paul Boniface stated that the owner has no choice. Listing is done through English Heritage, which has delegating accountability from the government to make the decision on listed status.

Alan Parrish (Heritage Trust of Nova Scotia) asked what proportion of heritage properties allows stay-overs and whether this revenue actually covers the cost of property maintenance.

Paul Boniface allowed that the revenues definitely do not cover the costs. He said that the proportion of such properties that one can stay in is relatively small — a few rooms in a castle, for example. However, within the National Trust is a limited company which rents about 300 holiday cottages found on Cornwall estates. These are economically self-sufficient.

David McDowell (outgoing Manitoba Governor, Heritage Canada) wanted to know whether the National Trust had been able to embed further education into the curriculum of Britain's public schools.

Paul Boniface said it is actually the reverse. The National Trust doesn't yet have the influence to change the curriculum. However, it fulfills curriculum requirements that already exist and many of its heritage properties have education officers who liaise with the schools to set up field trips to the sites.

Wendy Molnar (Cultural Visions Consulting, Winnipeg) asked how well the National Trust staff has embraced the changes.

Paul Boniface admitted that it has not been easy since there have been about 200 job losses, largely due to the reduction in regions. Another

1,300 staff had to go through selection processes to re-apply for jobs. At the moment, people are embracing the changes positively.

Keith Knox (Regina Municipal Heritage Advisory Committee) enquired about the 49 industrial sites and whether the National Trust is interested only in the buildings or the continued workings of the sites.

Paul Boniface said it is primarily the building that matters, although there is one mill in Yorkshire that will be operating.

Keith Knox wanted to know whether many properties are donated to the National Trust and, if so, whether there are any tax advantages.

Paul Boniface responded that, from the 1930s onward, there was a huge tax advantage. He explained that the landed gentry were left with big capital liabilities for houses and there was a plan where they could leave their houses to the Exchequer and have death duties waived. Then the Exchequer gave the properties to the National Trust. The relationships to the donor families are peculiar to each property. Sometimes the donor family still lives in the property or has the rights to live there for a few months each year. Today, donors would still get a tax advantage, but not as big as it used to be.

LUNCH EON S P E A K E R



**PRESENTER:
THE HON.
DIANE MCGIFFORD,**

The Minister of Advanced Education and Training, Province of Manitoba, delivered the following address:

Good afternoon delegates and special guests.

I am pleased to bring you greetings from Eric Robinson, Manitoba Minister of Culture, Heritage and Tourism. On Minister Robinson's behalf, I thank the Heritage Canada Foundation for choosing Manitoba as the site for your 2003 annual conference. Minister Robinson asked me to convey his regrets that he is not able to attend. He is extremely pleased that his Department is able to assist with the cost of the lunch today, and he wishes you well for a highly successful annual conference.

You have chosen a wonderful location for your conference in the historic Hotel Fort Garry. It is my hope that you will enjoy your stay here. I also hope you will take advantage of some of the opportunities available to you during this conference to participate in the tours that have been included in your agenda. You will see some interesting places.

We Manitobans are proud of our history and our historic places, and we enjoy every opportunity to host visitors. You may be interested in the fact that, in 1979, Manitoba became one of the first provinces in Canada to establish a department focused on culture and heritage. That was the year government founded the Department of Cultural Affairs and Historic Resources.

Today's successor to that original department, Manitoba Culture, Heritage and Tourism comprises an array of closely related programs and services that certainly ranks it among our most diverse government departments. In broad categories, the list includes historic preservation and interpretation, archives and government records, arts and recreation, libraries, government communications and tourism.

I tell you all this merely as a way of expressing the idea that, in Manitoba, we understand thoroughly the intrinsic and the economic values of maintaining our cultural heritage. For example, the Archives of Manitoba preserve and protect all kinds of recorded information from provincial and local governments, courts of law, school authorities, businesses, individuals and many types of organizations. It also has a special responsibility for one of our nation's greatest treasures, the Hudson's Bay Company Archives.

We are particularly proud of the work carried out by our Historic Resources Branch. This Branch plays a role in preserving many aspects of our province's history. Their goals include:

- fostering stewardship of Manitoba's heritage treasures;
- celebrating heritage as a foundation of culture and creativity;
- encouraging community heritage leadership and opportunities for volunteer participation;
- ensuring public access to information on recent discoveries and research findings; and
- demonstrating the economic viability of Manitoba's heritage resources.

The Heritage Resources Act (1986) provides the legal framework for the Historic Resources Branch operations.

The Act provides the authority for ministerial appointment of the Manitoba Heritage Council. This Council includes citizens from all walks of life who are selected for their interest and expertise in heritage matters. The Council makes recommendations to the Minister concerning identification, preservation, protection, commemoration and interpretation of historically significant sites, people, events and buildings in Manitoba.

Services provided under the Act include: protection, grants consultation, leadership development, awareness and promotion, and heritage project site development.

An example of an important initiative by this Department is the five-year agreement reached in 2001 with Manitoba Hydro and northern First Nations to mitigate the impact of the Churchill River diversion on archaeological burial sites in northern Manitoba.

I am pleased to report that Culture, Heritage and Tourism's Historic Resources Branch is also currently co-operating with the Department of Canadian Heritage in an initiative that has the potential to take heritage site conservation to a new level in Manitoba.

The new federal Historic Places Initiative will:

- add all provincial and municipal designated heritage sites to the national Register;
- introduce standards and guidelines for the conservation of historic places;
- establish a certification process for use in conjunction with federal tax incentive programs; and
- inform the public about historic places initiatives.

Seven other Canadian provinces have joined this Historic Places Initiative, and we believe it will add substantially to the conservation of Manitoba's historic sites in years to come.

Our ancestors came to Manitoba from all the corners of the earth and brought with them many gifts that have made ours a province with a rich and varied culture and heritage. It is our responsibility to keep those gifts safe and pass them along to our descendants, so they may learn of the past and take their own wisdom from it. I speak for all Manitobans and all my colleagues in government when I thank you once more for choosing Manitoba as the place to have this wonderful gathering. May this be a thoughtful and productive conference for all of you.

LUNCH EON SPEAKER



PRESENTER: RAYMOND SIMARD

MP for Saint Boniface, Manitoba, delivered the following address:

On behalf of my colleagues Ralph Goodale, Minister of Public Works and Government Services, and Ray Pagtakhan, Minister of Veterans Affairs Canada, I am pleased to welcome you to the Heritage Canada Foundation annual conference.

I would first like to congratulate the Heritage Canada Foundation as you celebrate your 30th anniversary. From your beginnings as a federally chartered organization created by the Honourable Jean Chrétien, you have matured to promote and ensure the preservation of heritage buildings and historic sites across Canada.

Indeed, over the last three decades you have witnessed the emergence of a workforce of built heritage professionals and tradespeople, and the human resource theme of your conference is proof of your commitment to ensuring the long-term vitality of the preservation field. This important milestone coincides with significant developments in Canada's heritage conservation movement, namely the Historic Places Initiative, which proposes legislation that will enhance protection for designated national historic sites. It is an exciting new era for Canada.

As I am sure you know, Minister Goodale has clearly stated that one of his priorities is "to help preserve Canadian culture and enhance community identity through the conservation

and management of heritage buildings in communities across Canada" and to work "in close partnership with the provinces, territories and municipalities to help preserve Canadian culture and heritage."

Through its Good Neighbour policy, for instance, Public Works and Government Services Canada (PWGSC) has committed itself to applying "good neighbour" principles to projects affecting heritage in other jurisdictions. The policy is simple: heritage and building sites and other property holdings are the tangible face and presence of the Government of Canada in many communities. PWGSC is committed to managing those holdings, not only in order to meet the requirements and expectations of its client departments, but also, where possible, to support the hopes and aspirations of those communities.

In addition to its contribution to culture, heritage conservation supports PWGSC's Sustainable Development policy because it provides strategies and technologies for reusing and improving the performance of existing buildings. I know that the Heritage Canada Foundation has made great strides in exploring the link between heritage conservation and sustainable development, and I commend your efforts.

Your conference theme this year is of particular interest and relevance to PWGSC on a number of levels. Most of all, as a custodian of heritage property, PWGSC is custodian of 178 federally designated heritage buildings, 34 of which are national historic sites. These properties represent a diversity of building types and vintages – from the 19th-century Library of Parliament to the 1950s National Film Board building in Montréal. PWGSC knows that its ability to be a good steward of this precious national heritage depends on the availability of specialist knowledge of materials, techniques and solutions, as well as innovative procurement and project management practices.

Such practices require collaboration. In the case of the Library of Parliament, for example, the project team responsible for its rehabilitation works very closely with a number of experts in the Federal Heritage Buildings Review Office

(FHBRO) to ensure that the integrity of this historic building is maintained.

Ultimately, the range of education and training available in heritage conservation in Canada — and the availability of a skilled workforce to repair, rehabilitate, manage and upgrade these buildings and sites — has an important impact on PWGSC. As a result, PWGSC is committed to participating in discussions with professional associations and industry to identify trends and be part of the solution.

PWGSC is also interested in your conference theme because of the role it plays as a service provider to other government departments that manage and use heritage buildings and sites to deliver their programs. PWGSC is the only federal government department with dedicated internal capacity in heritage conservation service delivery. Its National Canadian Heritage and Environment Canada Client Service Team houses people with unique skills in conservation architecture, engineering, landscape architecture and design history who work with the private sector and industry to ensure that cultural properties receive the approach and treatment they require. This conservation expertise supports the FHBRO and has opened doors to work across Canada and internationally on behalf of Parks Canada, PWGSC and Veterans Affairs Canada.

PWGSC has recognized the importance of reviewing its own internal succession planning needs for these specialist services. The Department is also aware of the need to identify ways to ensure that private-sector capacity will be in a position to meet changing requirements, and that the potential benefits and disadvantages of certification and accreditation of professionals and trades working on heritage buildings are fully understood. Again, PWGSC is committed to participating in discussions with professional associations and industry to achieve workable solutions to these challenges.

The stakes are very high. As the Heritage Canada Foundation has itself pointed out in its *Human Resources Issues* report, if we do not meet the demand for skilled workers, Canada's stock of

heritage buildings, estimated to be 1.7 million pre-1920s buildings, will be seriously reduced.

You will be interested to know that PWGSC has launched a new initiative to develop tools to ensure that heritage is a priority consideration in the stewardship of PWGSC property and to build PWGSC's profile as a leader in the conservation of cultural property.

Goals include establishing PWGSC standards for documenting, managing and upgrading heritage buildings; the development of investment strategies based on real "cost of heritage" data; and reconciling PWGSC's sustainable development initiatives with heritage conservation principles. PWGSC sees the Heritage Canada Foundation as an important partner in these initiatives, and we applaud your choice of the notion of "stewardship" as the theme of your conference for next year.

I'm pleased to report that PWGSC and Veterans Affairs are currently collaborating on a project of interest to all Canadians: the Canadian Battlefield Memorials Restoration Project, a five-year, \$30-million project to repair, restore and rehabilitate Canada's memorial sites in France and Belgium.

Thirteen memorial sites – now an average of 75 years old – will be renovated. The project work began formally in the fall of 2001 and is expected to be complete in 2006. The work is separated into four project areas, with the restoration of the Vimy Memorial Monument – designated a national historic site in 1997 – being the main priority.

The project to restore these memorials will conserve the physical symbols of the achievements and sacrifices of Canadians during the Great War. Projects such as this clearly underscore the importance of both Departments' collective mandate, which is to protect the cultural legacy and heritage places while fostering their appreciation and understanding by all Canadians.

I applaud the work being done by the Heritage Canada Foundation and I wish you continued success in your exemplary efforts to protect and celebrate our built heritage.

N O T E S
