TOWARDS A NATIONAL TRUST

PROCEEDINGS,

HERITAGE CANADA FOUNDATION CONFERENCE

SEPTEMBER 2000

HERITAGE CANADA FOUNDATION

LA FONDATION HÉRITAGE CANADA

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Produced with the generous support of the Department of Canadian Heritage

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Published by:
The Heritage Canada Foundation
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Ottawa, ON K1P 5R4 Canada

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E-mail: heritagecanada@heritagecanada.org
Web site: http://www.heritagecanada.org

ISBN:
0-888-14-202-1

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Opening Remarks

Brian Anthony, *Executive Director of the Heritage Canada Foundation*

As we enter this new millennium, there is a renewed optimism for the future of our past. During the past several years, the Board of Governors, the members and staff of the Heritage Canada Foundation, have been infected with this optimism. Last year our optimism was rewarded when the Minister of Canadian Heritage, the Honourable Sheila Copps, made public her decision to put heritage buildings and historic places closer to the top of the federal agenda. Her colleague, the Minister of Finance, reinforced this, when he embedded in the February Budget of this year an unprecedented statement of federal intent with regard to the built heritage of Canada.

This conference has been designed to help lay out the path of future stewardship for heritage property in Canada. The deliberations and discussions of the next two days in this consultative conference, combined with current research and surveying being done by the Heritage Canada Foundation, will, I'm confident, give us new directions. The subject matter of this conference, and the conference itself indeed, is perhaps one of most important undertakings that we have addressed in the history of our organization, and perhaps one of the most significant ones addressed by the heritage constituency as a whole in Canada.

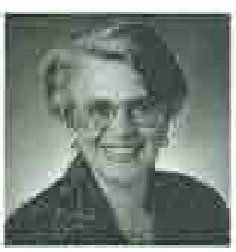
I want to thank you all for coming here and being a part of this.

Michael Kluckner, *Chair of the HCF Board and Board member from British Columbia:*

From our point of view, the Board of Governors, we feel that this conference represents a return to first principles for the Heritage Canada Foundation as we go forward by going back to where we were in 1973 when the then-Minister of Indian and Northern Affairs, the Honourable Jean Chrétien, founded the Heritage Canada Foundation. There was much talk at that time about operating as a National Trust for Canada.

Over the next couple of days in the sessions, you will be looking at the various roles that a National Trust could play for Canada. What we are attempting to do here is look at how we will build an organization that will be the steward of historic places in Canada. This in a country that has traditionally been a world leader in the protection of natural places only, regrettably.

I wish you all a very fruitful conference, look forward to your participation, and hope that you will get as much out of this as we will.



Trudy Cowan, *First Vice-Chair and HCF Board member for Alberta:*

It is a great pleasure to welcome the Heritage Canada Foundation back to Alberta, back to my home city of Calgary, and to one of my favourite buildings, the Palliser Hotel.

The Heritage Canada Foundation did have one of its meetings here about 26 years ago. The crowd was much smaller, but no less committed to the process of preserving Canada's past. Today, at a time in Canada's history when too much of our built environment is still facing an uncertain future or a wrecking ball, it is fitting that we're meeting again in Calgary to help the heritage movement and this very special organization both make connections and work towards a National Trust.

I welcome you all.

Session 1: Keynote Address

TOPIC: Heritage Trusts in Australia

PRESENTER:
Alan Graham, *Chief Executive Officer, Australian Council of National Trusts*

Alan Graham divided his presentation into four parts. The first part was an overview of the National Trust movement in Australia. The second part was about the Australian Council of National Trusts and the Australian management model for the trust organizations. Then, he outlined some difficulties with the current model, and in particular, some additional features that are not in any way elucidated in the Memorandum and Articles of Association. Finally, he concluded with a hypothetical question of what key roles, principles and features would make a brand-new National Trust in Australia more effective than it is today.

Mr. Graham explained that the Australian National Trust movement began in Australia in New South Wales in 1945. The specific catalyst for its formation was a concern about the future of an urban bushland in a Sydney suburb. It soon became apparent that many in the community were concerned with the wanton destruction of Sydney's built and natural heritage, and by the lack of government protection and planning for heritage places. The New South Wales Trust is the fourth oldest National Trust organization in the world. The Massachusetts National Trust in the United States is the oldest, followed by the trusts of England and Scotland.

Other National Trusts were formed progressively in each state and territory in Australia from 1955 onwards. There were two others formed in the 1950s, two in the 1960s and two in the 1970s. The Australian Council of National Trusts (ACNT) was formed in 1965. He said that in every single case, the catalyst was local community concern about a threat to a particular heritage place. Proposed demolition of a building or destruction of bushland areas stirred the community's passion, which provided the impetus of concerned citizens to establish the organization to protect the nation's heritage.

While the charter of the organization is to protect all heritage: cultural, both built and moveable; natural; and indigenous, to varying degrees, individual state and territory National Trusts still play a role in all three of those areas. The public perception in Australia of what the organization does is clearly linked with protection of the nation's cultural heritage, particularly the built environment. The reasons for this include the growth of other conservation organizations from the 1960s onwards, politicization of the natural environment issues and that the National Trust itself has been consistently vocal on the big environmental issues.

Mr. Graham emphasized that the role originally conceived by those who founded the National Trust is not what it is now. What has occurred in the last 10-15 years is the realization that the organization has become far more adaptable to changing world circumstances and conditions. The ACNT is very much a reflection of the federated political system that exists in Australia. To understand this political system, it is important to remember that, prior to federation in 1901, there existed six separate British colonies which were totally responsible for running their own affairs, and there is still a strong sense of independence today.

Thumbnail sketch of the ACNT

The Australian Council of National Trusts (ACNT) is a community-based, non-governmental organization committed to conserving Australia's heritage. It is not classed as a charity, but rather as a public benevolent institution. Effectively, it receives the same perks from the government as a charity would. It is income-tax exempt and recently has been granted deductible gift recipient status. This means it doesn't pay income tax, but is liable for goods and services tax, and is able to receive bequests in whatever form from individuals or organizations. In addition, the ACNT is allowed to receive donations from the public or organizations, and anything above $2 receives a tax deduction. Over the years, it has run quite a number of [fund-raising] appeals on behalf of itself and other organizations. For example, the Victoria Trust currently runs about thirty restoration appeals on behalf of various community and church organizations.

The ACNT has about 80,000 members, with about 30,000 of those in New South Wales and in the State of Victoria, and just under 500 in the Northern Territory. Mr. Graham said there was a concern within the ACNT about what percentage of that 80,000 are truly committed conservationists. Primarily, because a number of individuals are now taking advantage of the ACNT reciprocal rights arrangements it has with 19 other countries that allow members free entry to historic properties when travelling overseas, people are now seeing this as very much a tourism product.

The organization also has about 8,000 volunteers who are involved in everything from property management to providing technical advice to states and territories to managing shops. He said it was obvious that these volunteers are an important huge resource. Again, there is a concern that the number of people who are now volunteering their services to organizations like the National Trusts is dwindling alarmingly. Moreover, the volunteer work force is now at such an age that within the next decade or so, there will be a serious shortage. For example, the New South Wales Trust runs something like forty technical and conservation committees alone out of its head office, thanks to volunteers.

The ACNT manages around 280 properties, of which 182 are opened to the public. The varied property portfolio includes large mansions, a joss house, jails, police stations, a gold battery, a foreign stock exchange, a ship and an extinct volcano. Conservatively, the organization has a moveable heritage collection with an insurance value in excess of $100 million. Some of those collections are nationally important, such as the colonial furniture collection that is spread nation-wide.

The organization employs approximately 250 people in various capacities. New South Wales and Victoria, the largest trusts, employ roughly 75 people in full-time and part-time arrangements. Northern Territory and the ACNT are the smallest and they employ two or three full-time individuals. Mr. Graham himself makes up 25% of the human resources of the Australian Council of National Trusts.

Collectively, the annual income of the organization is in the region of $22 million Australian, of which only about $2 million is sourced from government. Of that $2 million, about $800,000 comes from the Commonwealth Government and various operational grants are provided by state and territory governments.

What has happened within the Australian conservation movement relates to the development of the National Trust movement in Australia. Like in other parts of the world, Australia has experienced a tremendous growth in the number of conservation organizations actively trying to garner public interest and support. Many of these are internationally known: WWF, Greenpeace, Friends of the Earth, etc. Additionally, at the national level, the Australian Conservation Foundation was created in the late 1960s, followed by a progressive establishment in each state and territory of what we call conservation councils. Therefore, the 1970s, 1980s and the early part of the 1990s witnessed a huge increase in the support of all these organizations. However, this has somewhat contracted recently, as has, by the way, the membership of the National Trust. Also, in the last 10 to 15 years, Australia has seen the proliferation of a large number of smaller conservation organizations or single-issue groups.

This has meant the National Trust has found itself competing with these green organizations for supporters, the attention of government and, particularly, funding. In the Australian context, there's a real community concern about environmental issues. Over time, it has resulted in extremely large amounts of money going towards the green movement. For example, the present federal government introduced the Natural Heritage Trust and provided various green organizations with total funding of *$1 billion* Australian over a four-year period. Compare that to about $50-$60 million that is provided to cultural heritage organizations and it's almost an additional funding factor of 200. These conservation organizations need this money to fix up land degradation, pollution of waterways and oceans, and those kinds of things, but there's a serious imbalance between the money that is going to the green lobby and that which goes to cultural heritage.

What has effectively happened is that the green lobby has taken away the potential historical role of the National Trust. While the organization hasn't been marginalized in a lobbying sense, its advocacy front has been narrowed somewhat from its original role of dealing with all matters of heritage: cultural, natural and indigenous. There exists within government a clear mindset that the National Trust is very much a community-based authority that deals with cultural heritage issues. Most important, the National Trust in Australia is the only community group that is consistently lobbying government on a broad range of heritage issues. While it may be interested in environmental issues, the truth is it doesn't have enormous credibility with government when it comes to such matters.

Role of government and impact on the National Trust movement

One of the principal aims behind the National Trust was to ensure better protection of the nation's heritage. Of fundamental importance to this was the establishment of legislation at the commonwealth and state level. Only in 1998 did the National Trust finally achieve its objective, in the sense that the State of Tasmania finally enacted heritage legislation. The advent of legislation also created something of a dilemma for the National Trust. Once it was the lone heritage voice in Australia, used to being at the forefront, but legislation also meant the creation of state and territory heritage councils which were financially well-resourced and professionally staffed. This took away some of the limelight from the Trust and, to be honest, the Trust has had some difficulty in coming to grips with the new role for itself, according to Mr. Graham.

Heritage legislation provides a level of protection for heritage places by virtue of their inclusion on a state, territory or local government heritage register. The National Trust also undertakes a listing process called classification and, while this provides no legal protection, historically, its existence has been greatly useful in persuading an agency or company or an individual to reconsider any demolition proposals. Collectively, the National Trust has classified 23,000 places in Australia.

The federal government first introduced heritage legislation in 1975 and, because of that, established the Australian Heritage Commission (AHC). The main function of the Commission is twofold. One is to run the register of the national state, which lists about 13,000 places, and the second is to oversee what happened with Commonwealth-owned heritage properties. The problem with the heritage legislation at the commonwealth level is that, in effect, the Commonwealth has no power to ensure that any Commonwealth agency undertakes any works that it may recommend. The situation is such that the AHC has no effective power to require a Commonwealth agency to do anything it wishes it to do. The register of the national state also has no legal power. While it can list places, and because of that, there may be opportunities for the AHC to persuade entities to do something, there is no legal power from the listing.

States and territories now have legislation that provides a level of protection because of the inclusion of a place on the state or territory register. The current concern is about the quality of the legislation and therefore the real protection that is provided. This is because at state and territory level there is far too much ministerial discretionary power (as the minister may override any recommendation from the respective heritage council) because of the speed with which the states and territories are actually registering places. In spite of this state and territory legislation, there have been numerous instances where state governments introduced new legislation overriding the heritage legislation to ensure their wishes are met. There have been development activities in nearly every state where its government introduced new overriding legislation to ensure that development occurs. One classic recent example happened near Sydney Harbour, in a place called Walsh Bay where there were six or seven wooden piers, the only example of wooden piers of their kind in the world. A developer came in and wanted to create apartment accommodation on these wharves. Legislation was introduced, despite the New South Wales National Trust taking the matter to court, and now those new apartments are being built. This is happening literally everywhere, said Mr. Graham.

Local government authorities are able to provide a level of statutory protection by virtue of a listing of heritage places in planning schemes. In a sense, this has yet to be tested. It is fairly new in Australia. Most state governments now require local authorities to undertake a heritage assessment of their areas, and within a period of two or three years they are required to include all heritage places within existing planning schemes as part of a register.

Basically then, there is some level of heritage protection within state and territory governments and some level of protection, at least theoretically, within local government. However, the piece missing from the loop is the federal government, in that it has no authority at all in terms of heritage protection. What the federal government is now proposing is a brand-new regime that essentially delineates responsibilities. It is quite keen to establish a national list of nationally important heritage places. What it also intends to do is develop a series of bilateral agreements with state and territory governments, and as part of those agreements there will be negotiated standards and principles which the states and territories would have to meet. It also proposes establishing a national heritage council and a new strategy for Commonwealth-owned heritage places. What is not clear thus far is detail in relation to its strategy for its own places and, more important, what power a national heritage council might have.

There is some concern within the National Trust about the overall proposal, not the least of which is that it establishes a national list of places. The Commonwealth has said it would take management responsibility for those listed places, but what happens to those thousands of other places that have already been identified as having heritage significance? Who will be responsible for the management of those? What will the Commonwealth do to protect those places?

Historically, in Australia, places have been listed based on criteria. There has been no categorization and no point-scoring to ensure a place is actually entered onto a particular list. Places, then, essentially have been recognized for their heritage value based on social, cultural, natural, historic, architectural or aesthetic values. The interpretation of that may be slightly different in each state and territory. There is major concern in the heritage community about what the federal government is proposing. It appears to be moving toward a categorization of Australian heritage places.

The federal government, under the Natural Cultural Places Program, provides $4.1 million annually for restoration activities nationally. The allocation is very dependent on ministerial discretion. The state and territory governments provide varying amounts of money. In the smaller states, it is only $200,000-$300,000 annually. In New South Wales, it is about $2 million annually. Local government provides a variety of incentives such as rate rebates, to try to encourage heritage conservation.

Of importance to the National Trust has been the broadening of the role of the various government agencies into activities beyond regulation and legislation, in particular, promotional, advisory and education activities. This has impacted substantially on the National Trusts that simply do not have the resources to compete. It has also resulted in the duplication of activities and the waste of resources. There are also important issues involving the delineation of responsibilities and the need for better strategic co-operation between government and non-governmental sectors, leading to better heritage outcomes.

Overview of the Australian Council of National Trusts (ACNT)

Each state and territory National Trust is fully autonomous. It is responsible for its finances, manages its properties, services its membership and does its own promotional work. Instead of a single membership database in Australia, there are eight. The organizational structure of each trust varies. The majority of them operate under the auspices of an Act of Parliament that delineates the role and establishes the governing system for the given trust. However, three offices of the National Trust in Australia are actually limited companies and operate under the *Companies Act*. That path was chosen deliberately to keeps them at arm's length from government. The governing council and boards are either elected and/or appointed by the responsible minister. Numbers range from 15 to 27, although in the past decade those have been reduced substantially.

The role, then, of the ACNT is to act as an umbrella organization, particularly at the federal level. Funding for the ACNT comes from three sources: a $250,000 grant from the federal government, a levy based on membership imposed on states and territories (about $140,000 for this year), and money generated from other sources such as sales and publications. In the last two years, the levy has increased from $2 to nearly $4. Mr. Graham said this is a reflection of the states and territories recognizing that the ACNT is doing a job for them in the federal context and that the money currently available from the federal area has been diminishing for the last decade.

The ACNT consists of two members from each state and territory National Trusts who are directors of the board and have the same responsibilities as director of a public company. The ACNT meets twice annually and occasionally conducts activities out of session.

Mr. Graham emphasized that the ACNT can only recommend matters to the states and territories for consideration. Administratively, this is quite cumbersome, but it works quite well. If the individual from the state or territory (and it is normally the president or senior member of the respective board or council) agrees to a proposal, then generally the state or territory can be "persuaded, cajoled or bullied" into agreeing to the recommendation.

The state trusts recognized early on the importance of having a national presence, and the first meeting of the Australian Council of National Trusts was held in 1965. The rationale behind establishing a national office was a very simple one. To be truly effective, the organization needed a national secretariat that allowed the organization access to, and the opportunity to influence, the federal government, opposition parties and the federal bureaucracy. Initially, the secretariat was housed in Sydney in New South Wales, but it was moved to Canberra, the national capital, in 1981.

Under its Memorandum of Association, the ACNT was given the following objectives:

- express views and opinions of the organization at the federal level,
- provide a forum for knowledge and information exchange amongst council members,
- represent and act on behalf of the Australian National Trust movement internationally,
- act as a public education institution and assist the organization to procure funding for it, and
- promote legislation.

Although the organization is carrying out all of those things now, Mr. Graham said that one part not being maximized is the issue of the ACNT acting as a forum for knowledge and information exchange. While meetings in themselves are useful means by which information can be exchanged, the ACNT has had a problem convincing individual states and territories to pick up on a good idea that another National Trust might be using. For example, the Victoria National Trust has been running the Traditional Home Show for the past five years. The intention was to put owners of older properties in touch with suppliers that had products appropriate for restoration. It has been an extremely useful initiative because it has promoted the organization, provided an information exchange, taught individuals about restoration methods and brought in new membership. This initiative was run by only one other trust in Australia for one year. This initiative has enormous relevance to every trust.

To be able to fulfil these objectives, the ACNT has been given appropriate powers allowing it to enter into agreements, make gifts, purchase leased property, provide guarantees or indemnities, invest, borrow, raise money, etc. However, in satisfying these objectives the Memorandum and Articles of Association impose one important overriding stipulation: that the Australian Council of National Trusts must preserve and maintain the autonomous existence and functions of each state and territory trust.

What does the ACNT *actually* do?

The advocacy role requires regular meetings with politicians, advisors and senior civil servants; preparing extensive submissions and attending public hearings on a wide range of federal parliamentary inquiries which impact on heritage issues; preparing an annual budget submission, and mounting specific campaigns. Over the next year, it will be mounting the Heritage Dividend Campaign in the hope of convincing the federal government to allocate more resources to cultural heritage generally. The ACNT also represents the National Trusts on various committees and working groups. It has been able to maintain operational and program funding, and has opened up new opportunities for state and territory trusts. At a time when allocations to other conservation organizations by the federal government have decreased by 40% to 50%, at least the ACNT has received the same amount of money that has been allocated consistently to the state and territory National Trusts.

The Australian Council of National Trusts has been quite successful in convincing the Australia tourism department to open up regional tourism programs by recognizing heritage projects as economic opportunity. Recently, as a result of special centenary funding for cultural and heritage activities, it was partly influential in ensuring that $18 million of the $40 million was allocated to various trust projects.

Internationally, liaison remains a very important role. The ACNT was responsible for organizing and running the 9th International National Trust Conference, and because of that, there is to be an Asian-Pacific National Trusts network established.

Promotional initiatives are also very important. The ACNT does a lot of work nationally on various promotional activities, particularly membership. It runs membership initiatives on behalf of the state and territory National Trusts and establishes a national membership rate. In addition, the ACNT is involved in producing articles for magazines and other media.

Mr. Graham said the ACNT has been successful in running separate and complementary conservation agendas with the state and territory trusts. This has allowed it a degree of flexibility in the way conservation advocacy work is undertaken. Generally, the states and territories are very happy for the ACNT to undertake and run national conservation agendas. Periodically, with their assistance, the ACNT involves itself in a local issue that has national significance, thereby ensuring that the issue is brought to the attention of the relevant authorities.

The ACNT has taken a leading role in national policy activities and the preparation of national guidelines. One recent example of a national policy being adopted is the policy in respect to Aboriginal people and the Torres Strait Islanders in Australia.

ACNT difficulties and additional features

Mr. Graham said that from a national office perspective, there are some perceived difficulties with the structure. The current Memorandum and Articles of Association very clearly stipulate that the ACNT is an entity to be controlled by the states. The difficulty is that time and circumstance have moved on, and there has been a generational change since the ACNT was formed in 1965. The current management model means the functioning of the ACNT is too much governed by personality rather than structure. Because the ACNT is not charged with specific responsibilities, it is much more difficult to measure performance when the role is essentially to assist or act on behalf of. In many respects, in the eyes of the states and territories, the Australian Council is a secondary consideration.

There needs to be a change in emphasis to a position where the management model is much more a partnership between the national office and the states and territories, where responsibility is given recognizing that by doing so, the whole organization will benefit. He recommended that marketing of the organization, such as profiling, promoting and fund raising, should be a national responsibility based on a national strategy agreed to by the states and territories. Any state activity should be complementary to the national focus. All the evidence very clearly indicates that, for example, companies interested in sponsorship opportunities want to deal with one office and want maximum "national" exposure. There is a growing awareness within the Australian movement that change is necessary and, to a degree, there's some evidence of it already.

There is one very important role that the Memorandum and Articles of Association do not cover, which is now effectively done by the national secretariat anyway, and that is the need for a greater co-ordinated approach for the work being undertaken by the organization. The word co-ordination does not appear in the document at all. Yet it is singly the most important thing the Australian Council of National Trusts does.

Increasingly, there is a growing realization that to maintain its strategic position, to be able to react quickly to a national agenda, and to be able to gain maximum advantage for the valuable work the ACNT undertakes, it must be more than just a regime which facilitates information sharing. The ACNT alone has no specific charter to do so. These days, "reinforcing the brand," or projecting the image of a single entity in order to ensure very clear messages reach the public and government is critically important, he said.

The need for co-ordination has manifested itself in many ways in the last decade, for example, through the adoption by the state and territory National Trusts of a single logo, use of the corporate identity manual, creation of national events such as the three-year-old Endangered Places Program and through the establishment of annual meetings of professional staff from state and territory councils.

In recent times also, the executive officers and CEOs of various state and territory trusts, and with Mr. Graham as Chair, have been given a specific task by the ACNT board to assess and recommend appropriate action to reduce duplication and improve efficiency and effectiveness within the organization. The task is deliberately very broad and the intention there is to cover as wide a range of subjects as possible. The group has two years to come up with a series of recommendations in relation to a host of activities that the organization undertakes. A lot of those measures are leading towards a greater degree of co-operation and partnership within the organization.

Hypothetical question

Mr. Graham posed the question of what would be the best way to set up a National Trust in Australia if it could start all over. He then provided his own suggestions, saying there were two basic points. The role of the organization, both externally and internally, needs to be more clearly delineated. Externally, for example, the organization needs to sit down with all levels of government and formalize a very clear role and agenda for itself. In Australia, the waters are very muddied because of the activities of all agencies muddling about.

Internally, the issue is the same: more clearly allocating roles and delineating responsibilities. This would allow the organization to gain the maximum advantage. The ACNT should have a direct responsibility for co-ordinating the activities of the National Trust movement. This is probably the single most important function that the ACNT could undertake.

Secondly, marketing and communications activities should be a primary responsibility of the ACNT, with the states and territories undertaking activities complementary to those, based on agreed objectives discussed within the whole organization. To maximize the message, it must be done on a national front. Policy and development of national guidelines should remain as a key responsibility within the ACNT, thereby maximizing greater uniformity of standards within. Membership should also become a national responsibility, which would tie in neatly with marketing and communication responsibilities. In addition, it would be important for the ACNT to continue to run national events and activities such as the Endangered Places Program. Advocacy responsibilities should be a dual responsibility, with each taking responsibility for their own domain and co-operating when required.

The state and territory National Trusts should, and must, have sole responsibility for property management and volunteer management. They would continue with a variety of other activities involved with profiling and promoting the organization where they were complementary to the national effort. He added that such a new regime would require acceptance by the states and territories, and would not be an easy thing to achieve.

The other factor relating to this hypothetical question would be to ensure that some kind of mechanism would be in place to review activities on a regular ten-year basis.

DISCUSSION/QUESTIONS

Trudy Cowan, HCF vice-chair, said that the number of similarities between the Australian situation and Canada's was overwhelming. She then listed several: the variety of legal protections; organizational structures that occur with regard to natural, cultural and built heritage; the need for co-operation between governments and the non-governmental organizations; and the need for a strong central voice for heritage that is reinforced by the provinces and territories.

She added that it was critically important for any National Trust structure to have central co-ordination ability while remaining flexible enough to deal with each province and territory's needs and to be clear in defining the roles and responsibilities.

[Further discussion was deferred until the afternoon sessions.]

Session 2: Stewardship

TOPICS: Exploring the current state of public stewardship of our built heritage. What are the strengths and weaknesses? There are many heritage organizations and historical societies now involved with the management and interpretation of heritage properties. Can governments and the private sector do more? Can we create a balance between private philanthropy and government activity?

PRESENTERS:
Robert Moreau, *Manager, Federal Heritage Buildings Review Office*
Wayde Brown, *Manager, Heritage Property Programs, Nova Scotia Museum*
Father François Boissonneault, *Board Member, Quebec Religious Heritage Foundation*
Michael McMordie, *President, Calgary Civic Trust*


Moreau

Robert Moreau focussed on the Federal Heritage Buildings program and looked at the challenges to federal custodians and some of the new directions they are taking to meet those challenges. He made it clear that he was not here speaking on behalf of all federal custodians. His talk was based on his experience managing the Federal Heritage Buildings Review Office (FHBRO) of Parks Canada and from working on a focus group on heritage issues for federal custodians.

He explained that the federal government has three programs of historical designation that identify, evaluate and protect Canada's heritage. It has national historic sites, heritage railway stations, both under a statutory authority, and the federal heritage buildings program, which deals only with buildings 40 years old or older administered by the federal government and is covered by Treasury Board policy. The policy that guides the federal heritage buildings program has been in place since 1982. Its purpose is to help federal departments better manage their federal buildings. It requires all departments to acquire, use and dispose of buildings in a manner that protects their heritage character. It is a value-based policy. Its effectiveness depends on custodians understanding what is the heritage value of that building and considering that value when making decisions.

The role of the Federal Heritage Buildings Review Office (FHBRO) is to assist departments to implement the policy. This is done by evaluating the heritage of buildings, describing the heritage values of the buildings to custodians, usually by providing them with advice when they are doing interventions to those buildings, and producing heritage conservation tools and training. FHBRO is not a funding body but an advisory one. The decision making for federal heritage buildings lies with the custodians.

Mr. Moreau said that, in terms of evaluation, FHBRO is based on a well-established set of criteria that looks at the historical association of buildings and their architectural value. An interdisciplinary committee evaluates buildings with the custodian as part of that committee. There are two levels of designation: classified (the highest level) and recognized. The Minister of Canadian Heritage designates all recommended buildings. There are 254 classified buildings designated so far and 1,033 recognized ones. This represents about 3% of the total federal inventory of buildings. FHBRO has evaluated 6,400 buildings in 18 years of operation.

Federal heritage buildings range in size and function from the guard tower at Dorchester Penitentiary in New Brunswick to the Bay Street Drill Hall in downtown Victoria, from the Cape Hind Lighthouse in Newfoundland to Rideau Hall in Ottawa. Most federal heritage buildings have retained their original use, some have been adapted to new uses and some no longer have a functional use and have been acquired by Parks Canada as part of a national historic site.

The responsibility for the care of these buildings is shared among 20 custodians in 321 communities across Canada. The top five custodians, Parks Canada, National Defence, Public Works, Fisheries and Oceans, and the National Capital Commission (NCC), manage 88% of federal heritage buildings in Canada. Thus far, the federal government has done a very good job in the care of those buildings because, in eight years, only 28 buildings have been demolished, or less than 2%.

One challenge facing federal custodians is the current state of heritage assets that are "in a declining state of health." Last year, a focus group, of which Mr. Moreau is a member, surveyed custodians of federal heritage buildings. Twelve custodians who manage 96% of the buildings responded. According to the survey, more than one-third of federal heritage buildings were in fair-to-poor health. There are many reasons for this, but Mr. Moreau said the main one is a lack of resources.

Funding is the biggest concern of custodians with the exception of Parks Canada and the NCC, which have a mandate of conservation. Heritage conservation is not part of the core mandate of federal departments, and consequently they have difficulty in securing financing from central agencies to protect federal heritage buildings. Another factor is the downsizing in the real property management section of departments. This has caused a decrease in asset management planning which, in turn, has resulted in not knowing what is the health of some federal heritage buildings. Custodians believe that heritage buildings have a higher operation and management (O&M) cost than newer, more efficient buildings. This belief, although undocumented, affects the will of custodians to use and re-use heritage buildings—and this is a concern.

Mr. Moreau said there is a study in the United States on federal heritage buildings that were compared to office buildings in the private sector. It showed that O&M costs for heritage buildings were actually 10% less, and utility costs were far less, than those for private office buildings. A similar study was done by Public Works for its buildings in the Atlantic region and they discovered the same thing. Their heritage buildings were more efficient and had less O&M costs than their more modern structures.

Another concern expressed in the survey was the questionable suitability of federal heritage buildings. A majority of custodians said the buildings no longer met their program needs and converting them would require high capital investment. They also said it was difficult to adapt a heritage structure for a new use.

Custodians were also concerned with the increasing number of heritage buildings for which they are responsible. Recognized federal heritage buildings represent only 3% of the holdings of the federal government. There are another 49% not yet evaluated by FHBRO that are 35 years old or older. Consequently, at the current rate of designation, the size of the inventory of federal heritage buildings would increase in the next 10 years by 60% to more than 3,000 buildings. This would exacerbate the current difficult situation.

Disposal is another challenge for custodians. The federal government has downsized its inventory because of reorganization in the 1990s and the effects of that can now be seen. In the last few years, the number of federal heritage buildings has decreased from 57,000 to 45,000, or by 21%. Not surprisingly, then, when federal departments are disposing of buildings, surplus heritage buildings are the first ones to go on the disposal list. Under the current Treasury Board (TB) policy, when departments dispose of excess buildings, they must do it at the highest market value. However, there is another TB policy for heritage building disposal that requires the heritage designation of that building to be considered when establishing a market value. With the exception of classified buildings, which must be protected when they leave the inventory, there are no incentives for federal departments to dispose of buildings without protection. Mr. Moreau said that this is why it's so important for Heritage Canada to keep pressuring the departments to demand such protection.

Faced with these challenges, many custodians are finding new or alternative uses for federal heritage buildings. Parks Canada and the National Capital Commission, since both have to protect their buildings, have pioneered new ways of re-using their heritage buildings. For example, although the NCC owns the Wakefield Mill and McLaren House in Wakefield, Que., the buildings have been leased and will be converted into a conference facility that will maintain their heritage character. The renovations and the development will be funded by the private sector. The buildings will also be operated by the private sector.

Parks Canada has had similar experience in leasing by finding third-party involvement for its heritage buildings. For example, the Jasper Railway Station was taken over by Parks Canada to protect it, and the agency has introduced new appropriate use to the building. It will become offices for the Park, and it will maintain its original use since VIA Rail will still be associated with this building.

Other custodians are now looking at new use and involving others partners and levels of government. For example, the former Union Railway Station in Ottawa, now the Government Conference Centre, is going to be converted in 2001 into the Sports Hall of Fame of Canada. The federal government will still own the building, but the property is being leased to the Regional Municipality of Ottawa-Carleton and it is, in turn, involving a development corporation to fund the rehabilitation work of the building.

Mr. Moreau suggested that the most fundamental shift for federal custodians happened at the Central Experimental Farm in Ottawa and is still happening. In the 1990s, Agriculture and Agri-Food Canada identified the Central Experimental Farm as having little future use as a research facility. It was announced that some of the land and some buildings would be sold. The local outcry forced the department to reconsider how these buildings could be used. Some were transformed into offices and offered to non-governmental associations such as the Dairy Council of Canada. It is a very important paradigm shift and the hope is that other custodians will follow.

In terms of innovative approaches to disposal, the Department of Fisheries and Oceans (DFO) probably faces the largest challenge of them all. It must consider decommissioning 400 to 800 navigational aids in the next 10 years, and 130 of those aids are federal heritage buildings. One idea is to lease to third parties already operating lighthouses as historical sites and heritage attractions. Recently, the DFO has received permission from Treasury Board to directly dispose of some lighthouses to third parties for a nominal fee as long as the proprietor guarantees the lighthouse will remain for a certain period.

FHBRO has also looked at new ways to examine entire classes of buildings, and one of them is designating representative samples of federal heritage buildings. This was done recently for all of the 42 DEW line sites, which were Cold War sites in the Arctic, and involved 131 buildings. To avoid having the National Defence Department maintain buildings at sites that had been totally abandoned, each building was evaluated, then compared one to the other and, finally, the most historically and architecturally significant were selected and designated. In return, the department has agreed to protect these selected buildings.

Mr. Moreau concluded that, given the challenges, the federal stewards had done a good job. Concerns vary from custodian to custodian. Fisheries and Oceans has a huge challenge in terms of disposal, while National Defence needs capital to bring its heritage structures back to use. The funding problem is a general concern; however, a legislative base would go a long way in helping departments secure that funding. Perhaps, he suggested, a federal fund to assist custodians with particular heritage conservation issues could foster better stewardship. Perhaps that fund could be a short-term fund similar to what the federal government did in the early 1990s with accessibility. Then, Treasury Board allowed an amount of money to help departments re-capitalize their buildings to improve accessibility for the physically challenged. Now accessibility is part of the way the government does business. Maybe a similar approach could be taken for federal heritage buildings.

However, he made it clear that the solution for federal heritage buildings does not lie within the federal government itself. Lighthouses, among other buildings, have outlived their original functions for departments and it is necessary that other levels of government, NGOs and the private sector become involved in finding new uses and in protecting those buildings. In certain cases, this may challenge the heritage community's view of what should be done with surplus federal heritage buildings.

Mr. Moreau expressed delight with the new home of Heritage Canada in the Dominion Observatory at the Central Experimental Farm. He said more needs to be done to communicate the significance of these places. "It is truly by understanding their significance that people will take care of them, find new uses for them and then will sustain them for future generations. In this part, Heritage Canada and other heritage organizations across the country all have a role to play in building this culture of conservation in Canada."

Wayde Brown explained that the Nova Scotia Museum is not a single institution as such nor is its mandate restricted to the more traditional functions of museums like specimen rooms. It is a branch of the Department of Tourism and Culture and is responsible for many aspects of Nova Scotia's cultural and natural heritage, and for a wide range of presentation and preservation programs. This year, the provincial government allocated $9.3 million, down $300,000 from last year. There are 70 full-time civil servant positions within that branch, although that number swells to 125 with seasonal employees.


Brown

The museum's more familiar face is a family of 25 sites, which includes a few specialized institutions such as the Museum of Industry, Museum of Natural History, and Maritime Museum of the Atlantic. However, most of the 25 sites are historic properties encompassing more than 170 buildings as well as significant landscapes and furnishings. With these 25 sites, the Nova Scotia Museum is probably one of the most decentralized provincial museum systems in the country. This decentralized approach is very much part of the museum philosophy. Collection, research and publishing programs also form an integral part of its more traditional museum function.

However, Mr. Brown said there is also a less familiar side to the Nova Scotia Museum, and that is represented by a wide range of other heritage programs. These include:

- a community museum assistance program that provides operating funds
- an advisory service to 63 local, mostly seasonal, museums
- a program supporting the *Special Places Protection Act* which, among other things, addresses the protection of archaeological sites
- the heritage property program, which, in support of the *Heritage Property Act*, maintains a registry of buildings of heritage significance in Nova Scotia, provides financial assistance and technical support to owners of registered buildings, and provides support and advice to municipalities in development of local heritage programs.

In short, the Nova Scotia Museum is much more than a building or an artifact. It pursues a very broad public mandate.

While the Nova Scotia Museum collection can be traced back to 1831 and the Halifax Mechanics' Institute, the provincial collection of historic buildings was begun in 1939 with the acquisition of "Clifton" the Windsor home of author and judge, T.C. Haliburton. He lived here between 1836 and 1856. The oldest house in the collection is Perkins House, Liverpool. It dates to 1766 and was the home of 18th-century diarist Simeon Perkins. This house was added to the collection in 1947. In 1949, the Uniack Estate was purchased from the family by the province. Constructed in 1813 by Richard John Uniack, the Attorney General of Nova Scotia, this building contains virtually all the original furnishings that add considerably to the property's significance.

Mr. Brown said the acquisition of these three sites established—planned or otherwise—a stewardship role for the province based very much on a National Trust model, that is, care of public monuments, the value of which relates very much to the building's specific architecture and historical associations. The 1960 *Nova Scotia Museum Act* vested the responsibility for these three buildings directly with the Museum, which then expanded the collection in subsequent decades. As the collection developed, so did its diversity.

Some examples of it today include: the Old Meeting House in Barrington that was erected in 1765 and is the oldest Nonconformist house of worship in Canada; Sherbrooke Village, established by legislation in 1970, and which encapsulates an entire original mid-19th-century community, including domestic and commercial structures as well as courthouse, school and Masonic hall; Balmoral Grist Mill in Colchester County, in operation since 1874, and Ross Farm in Lunenburg County, owned and managed by five generations of the Ross family between 1816 and 1963.

Two major trends are illustrated by the gradual growth of this collection. The first is a developing emphasis on the building's potential to meet the interpretation needs of the Nova Scotia Museum in presenting the cultural history of the province. This is in contrast to the original trust-like goal of the province in acquiring architectural and historic monuments primarily for their protection and preservation.

The second major trend is the reflection of the ever-changing definition of history, of what stories are valid and deserve preservation and presentation, the evolving perception of our past and what heritage really is. Mr. Brown said this is a key issue for any kind of organization, be it a trust or a public program. An example of this trend is the Fisherman's Life Museum, a simple, vernacular structure with little intrinsic heritage significance beyond the local community, yet it enables the presentation by the province of a common Nova Scotia story —the inshore fishing family of the early 20th century—a story previously obscured by the more romantic tales of schooners off the Grand Banks. Another example of the growing emphasis of understanding and presenting the cultural landscapes associated with the museum's sites is Prescott House, built as Acacia Grove in the Annapolis Valley near Wolfville by Charles Prescott, an early horticulturist who cultivated Nova Scotia's apple industry between 1811 and 1859.

The museum's stewardship has been influenced by the provincial management structure. The shared stewardship role within the N.S. government underscores the inevitable conflicts between building maintenance needs and building conservation imperatives, and preservation sometimes, perhaps always, becomes a negotiated endeavour. When financial resources are reduced, the negotiation becomes more difficult. Last year, the amount of money given to the province's Department of Transportation and Public Works to look after Tourism and Culture's buildings, which are primarily the museums, with a few tourist bureaus thrown in, was $1.9 million. This year's budget was reduced to $0.9 million.

Of course, added Mr. Brown, there is a potential benefit through this shared stewardship, as it provides access to technical advice and support, especially in terms of architecture and engineering, and project management resources. These are resources certainly beyond the capacity of the Nova Scotia Museum. When you have stewardship given over to a government, then the effect of that stewardship is inevitably at the mercy of all of the whims of reorganization that constantly go on within government and its shifting of agendas.

The second influence is that two different management structures have developed for the Nova Scotia Museum's 25 historic sites. Centrally based full-time staff directly manage eight sites. For the remaining sites, local management groups play a key role. Often these are local historical societies, but in all cases, are incorporated societies with a board of directors. Staffing, interpretation and minor building maintenance for these sites are undertaken by the local management group, although ultimate responsibility, funding and ownership remain with the province. Major building repairs and conservation projects are undertaken by the Museum and Transportation and Public Works, but with the input of the local group. Besides the obvious benefit of incorporating volunteer resources into the management process, such structures ensure a local sense of ownership and, ultimately, relevance to the community of the museum both as a building and as a program.

Lastly, Mr. Brown noted that the larger mandate of the Nova Scotia Museum included not only preservation and presentation of cultural and natural history, but many other programs such as support of community museums and the management of a register of privately owned but designated heritage properties. The inclusion of the heritage property program last year into the Nova Scotia Museum mandate provided another tool to support a larger building preservation function. The 245 buildings on the provincial registry are effectively another collection of historic buildings, albeit privately owned. The museum actively helps to manage or preserve these buildings and is trying to present them in some way. In addition, an invigorated community assistance program adds indirectly to this preservation goal, given the number of supported community museums located within buildings of local heritage significance.

In closing, while the Nova Scotia Museum's collection of historical buildings represents a very early attempt at establishing a public building trust in Canada in 1939, the nature of that trust has changed dramatically, he said. While the museum maintains a program of building preservation, its situation within a government agency provokes several questions. When is it appropriate for a government agency to serve as a steward of heritage buildings? When is it practical or effective for a government agency to serve as a steward, given not only the resources and organizational problems mentioned, but also the philosophical and political shifts this past decade has witnessed in most parts of Canada? Where can public and private non-profit efforts be effectively combined?


Boissonneault

Father François Boissonneault stated that five years ago, in the Diocese in the City of Québec, there were 273 parishes. However, today there are only 250 due to closures and declining congregations. Although there are buildings of incredible heritage value, the community that took care of them no longer exists, or those that do exist in certain places no longer have the ability to maintain them. It is the same for other dioceses and colleges. Thus, from all the religious traditions in Quebec, it was decided to set up the Quebec Religious Heritage Foundation.

This Foundation is very important as it was created to ensure that the significance accorded to such religious places is protected and preserved. Religious establishments have been present since the beginning of Quebec society. Overall, in Quebec's cultural heritage, religious heritage is the most diversified, most visible and widest spread across the province. It expresses the social, ethical and philosophical values of the society.

The Foundation believes that the value of religious heritage in Quebec rests on five major criteria: architectural, historical, artistic, urban, and social and cultural roles. The urban area buildings are of major international importance because of their original construction and the architectural styles they express. The ancient nature of some of these places confers an exceptional historic value on them. The symbolic value and character of certain monuments and their role in the community may also contribute to this historical value. The overall grouping of these heritage sites offers historic diversity as more than 300 years of religious, social and cultural history of Quebec has been witnessed through them. Perhaps more than in the public buildings, the churches show some of the best interior heritage: the paintings, sculptures, furnishings, stained-glass windows, crystal and great organs contribute to this artistic value. The religious heritage buildings show tremendous craftsmanship. The churches are a major component of Quebec life because the villages developed around them—and city life too—providing community services and cultural activities.

The Quebec Religious Heritage Foundation is a non-profit, multi-denominational organization whose purpose is to assist communities to conserve and restore their religious heritage and valuable treasures. There is an administration board with 15 members representing all the religious traditions in Quebec. From this is drawn an executive committee of three. Each region of Quebec has a council made up of religious representatives, heritage building owners, historians, architectural experts and staff from the provincial Ministry of Culture. They decide which buildings should be restored within their own region and each region receives a budget from the Foundation.

The Quebec Ministry of Culture and Communications funds the Foundation. The Foundation's participation in the financing of the restoration works should be at least 15%. Only religious heritage structures built before 1945 that are still being used for religious purposes are eligible for grants. This represents about 1,005 buildings in Quebec. Some are architectural monuments classified by the province. There are more than one hundred of those: basilicas, cathedrals, churches, chapels and synagogues belonging to various religious communities, convents or colleges, churches of missions and Amerindian reserves, procession chapels, wayside crosses and shrines. There are also old cemeteries, funerary chapels, as well as great pilgrimage centres and presbyteries. The interest is in the buildings, not the specific religion.

More than $100 million has been invested by the Quebec government in this Foundation. Less than 2% of the funds goes towards administrative costs. In the past four years, the Foundation has supervised more than 1,000 urgent jobs in restoration and preventive maintenance throughout the regions. The Foundation recognizes that religious heritage is a part of the fabric of Quebec's cultural heritage.

The Foundation's mission is based upon the belief that the use of the heritage remains the best guarantee of its preservation. When it is evident that a place of worship can no longer be used for the purposes it was built for, the Foundation will then try to recycle or find another use for it. This is only acceptable if certain criteria are respected: compatibility of functions, preservation of the architectural characteristics and interior decoration. Demolition is a last resort. The Foundation is now participating in a new grant program for adaptive re-use of religious buildings.

However, after more than four years of operation with things working out in a very positive manner, the Foundation still has a certain challenge to meet. Dozens of churches with important heritage value have been lost. The ageing of the population, coupled with the decrease in religious professions, has affected the preservation efforts. Some buildings will no longer be used as places of worship because fewer people are interested in religious worship.

Father Boissonneault said that there must be other ways to solve the problem since recycling cannot solve all of this. Certain monumental churches in the heart of the cities are expensive to maintain and their congregations are decreasing. The Foundation's program only considers places built before 1945 and there is a growing need for repair and restoration work on these structures.

Finally, other aspects of religious heritage are not being protected: archival documents, photos, privately owned monuments in cemeteries. There is enough to keep the Foundation occupied for many years. It remains for it to find methods of financing to ensure long-term preservation for the entire religious heritage in the province. [Further information can be found at: http://www.patrimoine-religieux.qc.ca]

Michael McMordie, in opening his presentation, said, "Our responsibility to the future for the effective care of our heritage from the past often conflicts with present needs."


McMordie

Stewardship of the built environment in this rapidly growing city of Calgary with its lively economy must be reconciled with the need for new structures and the legitimate desire of property owners to reap their share of the rewards that economic growth brings. The Calgary Civic Trust, among other projects, is attempting to address this problem by looking at an underused mechanism for protection of heritage resources, and that is the use of legal covenants.

He said that of the four countries whose systems were addressed at this conference—the U.K., U.S.A., Australia and Canada—the Canadian federal government is least well placed to intervene in many cases where heritage protection is urgently needed. For that reason, local and provincial organizations have a very important role to play. Therefore, the Calgary Civic Trust, which was recently established but heir to the work of earlier organizations, was set up specifically to look at and try to attend to local issues.

Within the Civic Trust is a project on heritage covenants. Mr. McMordie explained that a covenant runs with the title of the property and is a legal instrument that describes various aspects of the property in which the owner is giving up, selling, or donating rights to another party. For historic preservation purposes, this could be the façade of the building, parts of the grounds, particular interiors or other features. The virtue of a covenant is that it leaves the bulk of the property in the hands of the original owner who is free to use, enjoy, develop all of the property except to the degree that certain features have been covered by the covenant.

A wrinkle in using covenants, which does not exist in the United Kingdom but is very important in the United States and is at the moment problematic in Canada, is the ability to place a real cash value on the covenant by the before-and-after method of evaluation of property. This evaluation requires a qualified real estate assessor to assess the property before the covenant, then consider the decrease in development potential created by the owner giving up control over the covenanted aspects of the property and that then establishes a lower value, in many cases, for the covenant.

The use of covenants is entirely possible under the *Historical Resources Act of Alberta*, but they have not been used for this purpose to date. They are widely used in the U.K., U.S.A. and in eastern Canada.

In the two-day workshop on covenants held just before this conference, representatives from these trusts as well as others from Canadian heritage organizations and from property developers worked through sessions involving international, provincial and local issues. It also looked at a series of case studies: three houses of historic interest, one fire-damaged apartment building now under redevelopment and a historic office building of considerable interest, to see what would be involved in describing these under a covenant and bringing this mechanism into play.

Outright public ownership and designation under the *Historical Resources Act* are the well-established ways of protecting historic properties, but each has its limitations and disadvantages. Robert Moreau has already discussed the problems that arise with public ownership being subject to changing public views of value, budgets and taxation. Equally, designation has with it a set of limitations in time and supervision, which makes it also valuable in some cases, complementary to but not equivalent to, covenants.

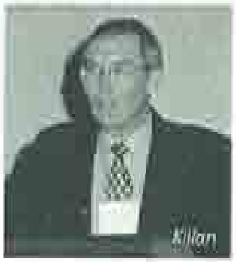
Mr. McMordie said that covenants offer a complementary approach with their own distinct advantages and limitations. However, they do provide a way in which suitably qualified and well-supported groups can act co-operatively with owners of heritage properties and sites. They enable owners to see that the historically important features of their properties are maintained in the future without their losing use and control of the rest of the property, and in a way that potentially distributes the cost of preservation and maintenance that are more acceptable to the various bodies involved.

This covenant project is part of the Calgary Civic Trust's ongoing program development. Discussions with the Alberta government have been under way for some time, and a reaction to the initial proposals for the actual model for such covenants is expected soon. The outcome will be a refinement and clarification of the project that inspired the workshop. The workshop has clarified some of the tasks that lie ahead. These covenants are not just for the Civic Trust alone, however. They will require the effort of everyone in the heritage movement, with Heritage Canada leading the way in dealing with some of the issues raised.

SESSION 3: LEGAL ADVOCACY

TOPICS: This session examines the current state of the legislative framework pertaining to the protection of the built environment. In Canada, the current pattern of heritage legislation has evolved over the past 30 years. What is working and what is not working? Can Heritage Canada play a role in legal advocacy?

PRESENTERS:
Gerald Killan, *Chair, Ontario Conservation Review Board*
Lisa Maltby, *President, Edmonton District Historical Society*
Frits Pannekoek, *Director, Information Resources, University of Calgary*


Killan

Gerald Killan spoke about the introduction of the *Ontario Heritage Act* (OHA) that put legislation into place for heritage protection mechanisms that still prevail in Ontario. He said, "The Act is a product of the late 1960s and '70s when a surge of interest in history and heritage conservation swept the country in the wake of our Centennial celebrations. The Heritage Canada Foundation and the Ontario Heritage Foundation are both products of those heady times." In common with other provincial jurisdictions, Ontario responded to the heightened historical interest by passing the *Ontario Heritage Act* in 1975 to protect the important and visible manifestations of our past, namely historic and architecturally significant buildings and archaeological sites. While the OHA was noteworthy for its day, it is now generally regarded as outdated and inadequate for present needs.

Under the *Ontario Heritage Act*, there are two specific legal tools or mechanisms for protecting heritage property: designation and easements. Both recognize the historic and architectural importance of property and provide a measure of protection from demolition or unsympathetic alteration.

The Act enables municipalities to designate individual properties of historic and/or architectural significance, or entire districts of heritage buildings. The critical point here is that the legislation, in giving heritage protection powers to municipalities, downplayed the role of the province (except in the area of archaeology). There is no provision in the OHA for the province to designate heritage properties of historic or architectural significance.

Designation of a heritage property is a local responsibility accomplished by municipal bylaw, usually on the recommendation of the municipally appointed Local Architectural Conservation Advisory Committee (LACAC). If there is an objection to an individual property designation, the matter is referred to a provincially appointed tribunal—the Conservation Review Board—for a hearing. Its report and recommendations are sent to the municipal council. The Conservation Review Board is an advisory body only, thus its recommendations are not binding; the municipality makes the final decision in designation matters. In the case of district designation, the designation bylaw is sent to the Ontario Municipal Board (OMB) for approval or for hearing objections. The OMB decisions are final.

Once delineated by a municipality, a property cannot be demolished for up to 180 days from the date that the local council refuses consent for demolition. The Act intends that during this 180-day period, the property owner, municipal council and interested community members have an opportunity to develop an alternative solution to demolition. If no solution is reached, then demolition can proceed. This is the basic or default protection for heritage properties under the *Ontario Heritage Act*. It lacks teeth.

Mr. Killan explained that it was partly *because* the designation clauses are relatively weak, that the designation mechanism has been so heavily used by many municipalities in Ontario—certainly much more than other provinces at the local level. There are some 5,000 individually designated properties in Ontario and 50 designated heritage districts. Municipal frustration over the weakness of the designation provisions, and the failure of the province to toughen the clauses governing demolition, has prompted a few local governments to seek additional power by special legislation. A few progressive municipalities including Toronto, London, Windsor, Hamilton and Ottawa have obtained enhanced powers through private members' bills. Under the clauses of these special bills, a designated property cannot be demolished even after the 180-day waiting period has expired until the owner has obtained a building permit for a replacement structure.

The second protection mechanism under the Act is heritage conservation easements. The OHA permits both local municipalities and the Ontario Heritage Foundation, a provincial agency with trust functions, to enter into easement agreements with owners of heritage property. Easements are agreements that must be negotiated with the property owner. They are registered on title and are binding on all future owners. A property protected by a heritage easement cannot be demolished without the approval of the holder of the easement (the municipality or the Ontario Heritage Foundation). Easements therefore provide much stronger protection against demolition than does designation.

There are some 150 municipal heritage easements in Ontario and another 180 held by the Ontario Heritage Foundation. Again, it is the weakness of the designation provisions in the OHA, and the lack of provincial designation mechanisms, that has resulted in Ontario leading other Canadian jurisdictions in the use of easements.

The main changes to the *Ontario Heritage Act* being proposed by heritage conservation activists, municipal and provincial officials, and even some developers, are as follows:

- The scope of legislation needs to be broadened. The definition of heritage resources should be widened to cover all kinds of community heritage, whether real property, objects or intangible expressions such as traditions and customs. The current Act restricts municipal conservation powers to heritage structures.
- At the same time, basic criteria need to be

entrenched into the Act to guide municipalities in determining heritage values for purposes of designation.

- Many municipalities want stronger powers to control the demolition of designated structures, along the lines of the legislation in those private members' bills. Municipalities want to be able to delay demolition until a building permit has been obtained for a replacement structure and the owner demonstrates that the demolition is reasonably necessary to accommodate the proposed use of the site.
- Municipalities need to be given greater freedom to offer property tax and other incentives to encourage heritage-related development. They should have clear powers to provide property tax rebates and deferrals for this purpose. The current Act merely gives local municipalities limited powers to encourage the conservation of heritage resources, mainly through grants. Municipalities are asking for a more diversified tool kit for encouraging restoration and rehabilitation projects, and are particularly interested in property tax incentives.

Mr. Killan said that "to be fair, the situation is not entirely bleak." Some Ontario municipalities have introduced their own heritage incentives for downtown rehabilitation and restoration initiatives. London's heritage program, for example, includes property tax rebates and façade loans. In addition, this year, Ontario introduced a provincial sales tax rebate on building materials for restoration/rehabilitation projects. The rebate policy has been running for just a few months.

Therefore, the question remains: would National Trust status for Heritage Canada be conducive to more effective legal advocacy than is currently the case in Ontario and, by extension, in other provinces?

Mr. Killan said that if Heritage Canada assumed all the functions of a National Trust based on the American or British or Australian models, which all include property ownership, fund raising and building a large, loyal, national membership base, it would possess a greater public profile and command greater political respect that could result in more effective advocacy work.

A National Trust could identify and promote, both at the national and provincial levels, the introduction of best practices in heritage conservation as they are found in jurisdictions in Canada and elsewhere. When provided with such contextual information, politicians do react. There are plenty of examples of Ontario's politicians responding sympathetically to progressive initiatives upon realizing their province has fallen, or is in danger of falling, behind other jurisdictions. Alternatively, some politicians will respond to put their province in the vanguard of a particular cause.

Heritage Canada as National Trust could assume a role similar to the one played so effectively by World Wildlife Fund Canada in the natural area protection field during its Endangered Spaces campaign of the 1990s. Using arguments of sustainable development from the Brundtland Commission, World Wildlife Fund Canada set a target of 12% of Canada's land and water base being placed in parks and protected places by 2000. Ontario took up that challenge through the Lands for Life strategic planning process and its Living Legacy outcome that saw a noteworthy expansion of our northern provincial parklands and protected areas. The World Wildlife Fund's advocacy work includes preparing and publicizing annual report cards on the success and failures of various provinces in meeting natural heritage objectives.

Using such a model, Heritage Canada as a National Trust could set the standards and identify the best practices for heritage conservation, advocate for their introduction federally and provincially, and grade each political jurisdiction regularly and publicize it in all the media.

For more than two decades, Ontario politicians have repeated calls for the reform of the *Ontario Heritage Act*. An influential National Trust might be the missing stimulus for legislative reform by targeting politicians, their staff and bureaucracies, and discussing the strengths and weaknesses of the Act within a broader heritage context.

Ontario politicians need to be shamed, he said, into recognizing the shortcomings in the *Ontario Heritage Act* vis-à-vis other provinces. For example, six provinces—Newfoundland, P.E.I., New Brunswick, Quebec, Manitoba and Alberta—are far ahead of Ontario in providing definitive protection to buildings against demolition. Ontario politicians need to be told that the British Columbia legislation explicitly states government has a duty to incorporate heritage into the planning process, that the Saskatchewan legislation requires notice be given of impending demolition of undesignated heritage properties, that the tax systems in P.E.I. and B.C. already provide incentives for restoration projects. Five of these provinces also have in place a system of government loans or loan guarantees for restoration, while Ontario does not.

Advocacy is two-sided. It involves both promotion of best practices, activities, legislation, etc. and opposition to bad practices, actions and legislation. Potentially, all Canadian jurisdictions could benefit from a Heritage Canada as National Trust that would engage legal counsel and become active in litigation like the U.S. National Trust does. Take, for example, the celebrated case of the U.S. National Trust versus the U.S. Corps of Engineers in 1981. The Trust alleged that the Corps was in violation of the *National Historic Preservation Act* for proposing the construction of a barge-loading facility near the historic Anderson Ferry on the Ohio River. As it happened, the Corps of Engineers had submitted to part of the process to review their plan, but issued a permit without completing the entire process. The court found the Corps was in violation of the law and awarded the National Trust fees and costs. Now that's legal advocacy with a bite.

If a National Trust for Canada were to undertake such legal actions it would need to be enabled to do so itself or have the ability to create a subsidiary agency for that purpose. A case can be made, Mr. Killan would suggest, that there is much to be gained in the area of legal advocacy if Heritage Canada were to be reconfigured as a National Trust.

Lisa Maltby spoke on behalf of the Edmonton District Historical Society, a small volunteer group. She explained that the majority of the Society's active members are not employed in the historical field. They are members because of a lay interest in some element of history and they do what they can for the historical community, as volunteers, at their own pace and to the degree to which they are inclined.


Maltby

In Alberta, the *Historical Resources Act* legislates history resource management, mandates the Alberta Historic Resources Foundation, and generally sets the stage for identifying and preserving built heritage everywhere in the province. Also of significance is the *Municipal Government Act* which gives the municipalities the authority to plan for the jurisdiction, including the preservation of historic resources, although it doesn't provide the authority to regulate or control those resources.

Under the authority of the *Municipal Government Act*, the City of Edmonton has created a municipal development plan that is designed to guide the city's growth, change and preservation goals for the future. She said that unfortunately, this plan is written in ambiguous language and cannot really be enforced. As well, the *Municipal Government Act* doesn't bind city councils to act according to its own plan.

There is also in Edmonton the land-use bylaw or a zoning bylaw. It is a legally binding document, but there is no zoning within this bylaw for heritage sites. They use a direct control zone for so-called unique sites that may include heritage sites. However, it is generally applied to heritage sites only at the request of the property owner.

Edmonton also has overall a heritage planning policy, a heritage resource management program, a historic resource review panel, a register of buildings having historic significance to the city, a policy on the maintenance of the register and guidelines for rehabilitation all within city policy. In other words, there is considerable paper to show that Edmonton values its built heritage, but, in cycles, it doesn't seem to be apparent in practice.

Ms. Maltby said that right now Edmonton has been in one of those cycles. In the last year, the city council removed a unique industrial building from its register of historic resources in response to a request for demolition. This action is in direct conflict with its own policy. Despite a series of discoveries on the site, including what may be the ramparts of the original Fort Edmonton, possibly an early graveyard, an Aboriginal burial ground and evidence of human habitation dating back 8,000 years, city council has not rescinded the motion. To the good, this building is still standing and people are still fighting the battle.

Most recently, the city has proposed to amend its bylaw that designates the façades of the old Hudson Bay Building so they can be altered to the point where they will no longer be regarded as a historic resource. Again, policy specifically forbids this amendment.

Last year, the Edmonton District Historical Society tried to challenge the city council's decision to redesignate the industrial building, the Rossdale Low-pressure Plant. She said it was interesting and educational, but ultimately a discouraging exercise. City policy states: "the register will *not* be amended to remove or add a specific historic resource in reaction to the submission of the development permit application to demolish or significantly alter a historic resource." But that is precisely what city council did. The policy was not readily available from city hall, although the historical society did find it through its lawyer at considerable cost to the small organization. The Society might have won in court, she said, if it had gone, or it might not have since city council is not obliged to follow its own policy.

The Society decided it couldn't proceed further for several reasons. There was not enough money for an extended court battle and it was expected that city council would "fight to the death because they have legal counsel on salaries so they could carry on for quite some time." Ms. Maltby explained that if the Society had fought it out in court and lost, the members could have found themselves personally liable for all the costs. Also, advocating outside the Society's mandate as stated in its bylaws would run the risk of it losing its charitable status. Finally, as most members have jobs, families and enough responsibilities, they didn't have the energy to continue such a high level of opposition. In the end, the Edmonton District Historical Society wrote city council pointing out the policy and asking them to please rescind its earlier decision. One or two councillors responded, but none agreed to do it.

Ms. Maltby said the overall experience is probably typical of small organizations that are trying to do crisis intervention. Part of the problem, she said, is that historic preservation in Edmonton is not really seen as something that will get a politician votes.

There have been some successes. The best example is White Avenue on Edmonton's south side. In the mid-to-late 1970s, before the Main Street program, there was talk of turning White Avenue into an arterial road to connect the west with the east. This would have meant that many wonderful old buildings that were part of the original Strathcona, a town amalgamated by Edmonton in 1915, would have been lost. However, there was an initiative put forward by a group of people that was successful. Part of the reason for its success was because it was located near the university so there were a lot of resources that could be tapped there, as opposed to operating in a vacuum. Once the idea caught on, funding was forthcoming and now there is a foundation that manages the area.

Now Whyte Avenue is not a freeway. Instead it is a friendly, trendy area full of people. It was saved from car heaven really because of a few committed, articulate, determined people who were able to attract more people to their cause. They have really succeeded quite thoroughly. Now—and this is what any kind of heritage policy should be striving for—no one would even consider buying a building in Strathcona with the expectation of tearing it down and putting up something else as the owner would have to fight the community to get anywhere with it. Preservation is much easier because it has become part of a set of values for that area. Ms. Maltby said, "It would be wonderful if this could extend to other places in Edmonton and elsewhere."

Currently, the volunteer sector puts in a lot of time and resources getting the issues surrounding historic resources onto the table. Legal advocacy, which is usually too costly for small organizations, becomes the only effective action, but it is not efficient for small groups. Certainly, tougher and more muscular laws are needed. This won't happen unless the politicians who enact the legislation have the will to do so, and the will is created when the politicians believe that the public demands it, if for no other reason than the desire to be re-elected. If there is an inculcated public belief that the average voter values heritage, legislators will be prepared to listen more carefully to volunteer groups, which could no longer be easily dismissed as special interest groups. That will help, but successful changes in the approach also need the support of the business community.

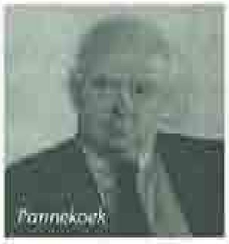
In Edmonton, and no doubt elsewhere, municipal legislators seemed to treat the business community as the authority on many aspects of local government, and specifically on the economic value, or lack thereof, of older buildings. That is quite reasonable to a point, but businesses aren't generally looking very far past their own financial health in the short term. The overall health of the economy is important, but the economic value of a streetscape in ten or more years' time doesn't seem to get much attention by the business community, and that needs to change.

The balance of power probably cannot be changed. The business community is likely to have the ear of municipal government in the short term, but maybe a climate that encourages businesses to see the preservation, renovation and saving of old buildings as a public service with economic benefits can be created. Businesses and corporations contributing to charitable organizations and endeavours already receive financial rewards. Why not give similar status to preservation of Canada's built heritage? It can be done—if there is a will to do it.

Compensation for buildings for preservation can be built into the overall structure of the financial world. At the same time, tax breaks for individuals preserving buildings can and must be implemented. If this compensation is provided, in addition to sending a clear message that Canada values its built heritage, two of the forces affecting legislation, the business community and the public, can begin to work together. In Edmonton, Ms. Maltby said, it seems business and the public have different agendas. If they end up having the same agenda, more could be done a lot more effectively.

Over time, the underlying values placed on built heritage can be changed. And if they are, legal advocacy will, for small volunteer organizations such as the Society, move away from the crisis intervention reactive battlefield to a broader collaborative effort that is less confrontational, and therefore is easier to sustain. A national plan for our built heritage needs to be established and conveyed into the public conscience. If that can be done, and supported by the public and business community, then the heritage movement stands a far better chance of succeeding than if it continues the same old way—one little bit at a time.

Frits Pannekoek, Secretary to the Calgary Civic Trust, described the development of the two-year-old organization. He said it was after reading Section 25 of the *Alberta Historical Resources Act*, which allows the Minister to contract with a non-profit organization to enter into covenanting arrangements, that he realized "that perhaps the Calgary Civic Trust could be such an instrument."


Pannekoek

The *Historical Resources Act* is an extraordinarily permissive document. It allows one to have anything one wants in the heritage world underneath that piece of legislation, *provided* the support is there from all of the community: the elected officials, civil servants, property owners, community groups and the general public, etc. If somebody does not wish to do something, particularly a minister or a civil servant, or is encouraged not to make it happen, it will not happen.

So what one should focus on in advocacy is creating alliances across the community that will encourage people to act in a collective way for the common good. In the case of the Calgary Civic Trust, it is preserving the as-built environment for the common good. The Trust regards advocacy almost as would-be sociologists. Its members recognize that a number of people have to be brought onside. The first group is the elected officials, whether they be federal, provincial or municipal. Before someone in the heritage movement goes to an elected official, he said to make sure that it is the right official: the person who is likely to receive the message initially. The Trust researches the background of specific elected officials: their interests, their investments, their constituency association executives, etc. Mr. Pannekoek said that some people consider this a predatory practice, but that he considered it fair game. One has to be very careful in this and it takes a lot of time, but well-prepared advocacy will succeed.

The second group of people who are often ignored are the civil servants. Ministers and elected officials have hundreds of agendas placed before them all the time. If one does not have an advocate within the structure, chances of succeeding are not very good. He said many people look at the civil service and think those people agree with the elected officials; however, some do not. As a former civil servant himself, Mr. Pannekoek said that most civil servants are underpaid advocates and feel passionate commitment, particularly in the heritage field. He suggested they can be one's strongest advocates. Within bureaucracies, professionals such as archaeologists, historians and architects often have different agendas. Some have power and some do not. Therefore, he suggested, one should make sure when "picking a civil servant to influence, pick the one who has real influence, one who feels passionate about the subject, one that the minister might listen to."

They do exist. Cultivate them, value them, work with them because an awful lot can be done that way, he suggested.

The third group, particularly in heritage, involves people dealing with real property. One must try luring building owners and resource owners onside, to work with them well before a crisis happens. This is what the Civic Trust is trying to do. Its patron, Art Smith, has provided very useful contracts for the organization. To have the right patron who can open the right doors is critical, so select one with great care, said Mr. Pannekoek.

The fourth group to bring onside is the general public, and particularly the community around a given project. Generally, people start there and think they have the community onside, but often it is just the segment of the community with the most to gain from the preservation element. It is necessary to have the broader community onside.

Another group that needs to be cultivated in any heritage movement, particularly to ensure change, is the prestigious non-profit sector. To have one's project funded, for example, in Calgary by the Calgary Foundation means a lot. It is not the amount of money that matters, but it is the fact that the most prestigious of the community foundations decides to back your organization. When one goes to see a provincial minister and one has funding from the Calgary Foundation, it matters.

Mr. Pannekoek said that perhaps the heritage community as a whole hasn't been good in building across these non-profit foundations. The heritage community doesn't look broadly at non-heritage influences.

The last group that it is vital to have onside —and one usually only goes after it when one is in a crisis—is the media. When a press member expresses an interest in heritage, he suggested, the heritage organization should invite him or her to join and perhaps even put them on the board of directors.

He said that one mistake advocates make is not having enough information. As an advocate, one can never have enough information. The elected officials one needs to influence have piles of information provided by civil servants, as does the corporate sector that has all kinds of development information. If your organization does not have that information, then credibility is lost because it is so easy to undermine someone by asking that one astute question. Another mistake made is trying to influence after the fact—not before. Also, going to the wrong person is a mistake. It happens often because somebody *appears* to be the right person, such as a provincial minister. The last problem is the mistake of hysteria. This is when a heritage group gets into an intervention crisis and hysteria breaks out. It is easy to dismiss anything if that project is based on hysteria.

How to be a successful advocate? Plan the campaign strategy carefully. Research, research and do more research. Then, based on a careful analysis of the society one is dealing with, proceed. Create a win-win situation.

DISCUSSION/QUESTIONS

Pat Malicki, a member of the Architectural Conservancy of Ontario, said that most people are aware that changes have to be made to the *Ontario Heritage Act*, but are also aware that not all changes will happen at once. She asked if it would it be better for the various heritage organizations to go together to the Ministry and try to see what can get pushed through.

Gerald Killan: He responded that it is always better to collaborate and show a common front. Alliances and partnerships are successful frequently in the natural areas. For example, when the World Wildlife Fund collaborates with the Sierra Defence League and the Federation of Ontario Naturalists, together they have clout. If the heritage movement could speak with one voice that could be quite powerful.

Brian Anthony: As HCF Executive Director, he asked whether there is a role for the Heritage Canada Foundation in the legal advocacy field. "When everything else has failed and when it is time to take the lawyers out of the holster, is there a role for us? If the Heritage Canada Foundation as it is currently configured, or as it might be reconfigured, had been in the legal advocacy business, would its assistance been the kind of thing that the Historical Society needed to take on Edmonton's city council?"

Lisa Maltby: She answered that help might have been useful with the industrial building, the Rossdale Plant, as it has national significance as an 8,000-year-old site. She explained that there were several other groups involved in this, but that they all have different agendas. The matter is now with the Alberta Energy and Utilities Board. The Edmonton District Historical Society was aware that it couldn't afford to do this. It looked at intervener status but the legal costs were going to run between $80,000 and $125,000. The costs were impossible for them. So, yes, if Heritage Canada had been in that business, the Society might have continued.

Brian Anthony: He replied that perhaps Heritage Canada could have put out an appeal for a fighting fund to assist the society...

Lisa Maltby: She said that yes, funding was important, but that legal advice was also needed. All the Society was getting in the way of legal advice came from the other groups. They all had an interest in the Society remaining in the fight but, as members, one could never feel comfortable that their answers about liability issues were accurate. That is another way a National Trust could certainly have helped the Society.

Frits Pannekoek: He also responded by saying that there is room for Heritage Canada to take on legal issues. But he warned that it would require a great depth of knowledge of the provinces' legislation, that it should be done in a partnership way, knowing what the consequences of failure might be, and that it would have to be done very carefully.

Doug Franklin: He asked for an update from the two-day workshop on covenanting held by the Calgary Civic Trust just before the HCF conference. Perhaps some ground-breaking work has been done right there, he said.

Frits Pannekoek: In reply, Mr. Pannekoek said that the Calgary Civic Trust hoped it could legally engage in the covenanting of properties. If someone deeded a covenant or interest in a property to the Civic Trust, there would be a tax consideration. Marc Denhez informed the Trust that the ruling received the previous week made this problematic for the moment.

For the covenanting workshop, the Civic Trust invited outstanding people from Great Britain and the United States to discuss the experiences there. There were also people from Alberta talking about their experience, including some very senior people in Calgary's development community. What was exciting about this was that the development community was very positive; they felt this was a potential route. Although they may be right or wrong, the perception is that a covenant is a gifting of an interest and that designation is the taking of an interest. They are very keen on exploring this. The Trust had a number of willing property owners come forward who were quite keen to have it experiment with their properties. Since it was a workshop, participants actually drafted some model covenants.

The workshop was built on good will across the public service, development community, homeowners' community and the heritage community. There are still many problems to solve. However, the Civic Trust's objectives are very long-term.

Dan Schneider: He spoke about the easements program in Ontario. The first easement was taken just shortly after the first heritage designation about 25 years ago, so the two mechanisms have evolved very much hand in hand. It is due to the weakness in the designation legislation that the Ontario Heritage Federation has been able to develop the easements tool to the degree it has. The program has been refined many times over the years. It is an excellent prototype and many Ontario municipalities that use it as a quid pro quo for development benefits have picked it up.

The Ontario Heritage Foundation traditionally acquired its easements on built properties in return for grants. Granting and subsidies are not what they used to be, so the provincial easements program has gone into a different phase where tax benefits instead of grants are crucial to the future of the easements program in Ontario.

With heritage buildings being surplussed across the country—federally, provincially and locally—there has to be a way to protect them as those properties move from public to private hands, and the easements tool is a good one. All it takes is to get the policy entrenched at all levels of government.

Frits Pannekoek: In responding to an earlier question, he said that he thought the role of Heritage Canada in a covenanting or easement program could be critical. The Alberta legislation, for example, allows the Minister to list the covenant at will, although it is rarely done. However, to have the backstop of perhaps Heritage Canada agreeing to hold some of the covenants would be very worthwhile.

Some of the developers have expressed their concerns about the small, new Calgary Civic Trust and its future. Heritage Canada has been, and will be, around a long time, and people want their easement held by an organization that is extremely prudent, conservative, highly regarded and possibly even national in scope. It is worth exploring the precise role that Heritage Canada might take in this area.

Ian Schofield: The Calgary lawyer suggested that one of the roles that Heritage Canada might consider is the use of test cases. A national organization could cherry-pick legislative issues and get judicial precedence for other people to use when they are battling under the existing legislation. He said that one must remember that, in legal advocacy, one of the ways to successfully negotiate in a legal context is to let the other side know there is a threat of a big sword to chop off their heads. One goes in with the olive branch and the sword because one can't do one without the other.

Session 4: The Constituency

TOPICS: What is the current state of our constituency dedicated to the built heritage of Canada? How can we build a larger, more active membership in the heritage community? Until now, we relied heavily on volunteers. Can we tap into the world of commerce more effectively? Could Heritage Canada have a strengthened role in achieving these goals?

PRESENTER:
Laurier LaPierre, *Broadcaster and Educator*


LaPierre

Laurier LaPierre, in his roles as Chair of Telefilm Canada and of Historica's Heritage Fairs program, suggested from the outset that the constituency is really the community.

He said that it is necessary to enlarge the entire perspective of what it is that we are about, even though we pursue our own individual or institutional activities. The word "community" is much better in the process of interesting all the people, all the constituencies of heritage.

"Heritage has many constituencies, but it only has one community and that is the community of the Canadian people. And the Canadian people, because of their range of interests, divide their interests into particular constituencies. But if we could build a community..."

Mr. LaPierre said that the purpose of heritage is to tell people about themselves. "Heritage is also," he said, "to quote the Heritage Minister's glorious obsession, that 'Canadians have the right to access their stories so that we can tell these stories to ourselves and to the world.'" He said this is a fundamental right of a nation and the fundamental responsibility of its nationals is to preserve that right, to live it and to enshrine it, and to see that it is done through the process of accessing the history, heritage and stories of Canadians.

He said that Canadians are the only people on the planet that deliberately and passionately see to it that their children are totally ignorant of Canadian history. It is not taught properly in most of our schools and now some people are attempting to resolve this issue by creating one history of Canada. But, he emphasized, there cannot be one history of Canada. "It is a stupid, useless act to pursue." Although Canadians lived together through all sorts of events from Confederation, the coming to power of Sir Wilfrid Laurier, the death of John A. Macdonald, the First World War, the Depression, etc., each person lived that differently. He warned that if Canadians look at Canadian history only through the keyhole of institutional political history as developed in the centre of Ottawa by "old men in tennis shoes," the result is that the heritage movement will lose a great number of our people.

Mr. LaPierre said it was essential to understand why it is important to preserve, restore and nurture Canadian heritage. For then, heritage can tell Canadians who they are and allow Canadians to tell it to the world though the various instruments that we might have. Canadian heritage is not just in old buildings, but in the memory banks of the nation, in the National Library and Public Archives of Canada, in the museums of Canada, in the art galleries, in the television programs and the films and also in the new reality of multimedia. He said, "We find our heritage in the buildings of our communities, in the land and in ourselves."

The essential characteristic of that heritage is diversity. Stating that diversity is the cornerstone of Canadian identity, he added that there can be no Canada without the recognition of diversity – linguistic, religious and cultural diversity. Canada is the refuge of humankind and has been so for many years. Consequently, it has brought to Canadian shores countless numbers of people whose heritage has become part of Canada's heritage. Canada is the only country in the world whose constitution makes it an obligation of citizenship to preserve that heritage, to be aware of it and respect it. That, in turn, imposes upon the whole structure and landscape the idea of belonging here.

There is not enough stress in the heritage story on the under-represented categories. Many historic sites in Canada are devoted to those French-speaking and English-speaking Canadians of the 18th and 19th centuries, but very few designated historical sites are devoted to the Native peoples. The heritage of new Canadians is often absent, as if it did not exist. The heritage of women is hardly spoken of, although in October in Ottawa, there will be the unveiling of a national monument to the ingenuity and the struggle of women to be recognized as persons under Canadian law. It has taken more than a hundred years to recognize that as a nation. While, he said, this has nothing to do with buildings, it has to do with the concept of what is heritage. In order to broaden the heritage constituency by attracting people to help save heritage buildings, which are so important to our national life, it is necessary to understand that concept.

Also, the youth are often not represented in sites or monuments. Mr. LaPierre said that, to his knowledge, there are two statues in Ottawa: one to Mackenzie King's young friend who died trying to save someone from drowning, and one to Terry Fox. Does this mean that all the youth of the country since 1608, and 4,000 years before that with the Native people, have done absolutely nothing but sleep in their cradles? Why is that?

To expand the constituency, the heritage movement must develop a community of interests dedicated to finding, maintaining, restoring, preserving and, above all, nurturing the heritage of the Canadian people. This heritage is not found in the Roman Catholic Church alone or in the other churches alone, and not in the traditional groups such as white middle-aged men. The heritage field does not represent all the groups that are in Canada. Consequently, the appeal of such a narrow group is detrimental to the expansion of the community.

To the question about whether heritage can tap into the world of commerce more effectively, Mr. LaPierre answered no. He asked why should anyone put money into heritage when it represents just a minority of the people of Canada? Someone who can afford a newspaper chain can give money to save a heritage building, and then a beautiful plaque is put on it, but to whom will it speak? If the heritage of Canada is that of the white man and woman, of the traditional religions and not of all peoples of Canada, then there is a fundamental problem.

He suggested that more groups, such as the Chinese community in Vancouver, need to be included to broaden the constituency. He said that they would provide money to save buildings because they want their experiences included as part of the heritage of Canada. They have been here since the beginning of the 19th century. In British Columbia, there are very few historic sites that are more than 100 years old. However, by drawing from that constituency or from other peoples who have been there for a long time, such as the African-Americans on Saltspring Island who moved here during the Civil War and with the Gold Rush, a larger, more active membership in the heritage community could be built.

If the heritage movement broadened its scope of influence to include the natural stakeholders and constituents within the community, then more people will come to the table to defend heritage. While these groups may not be able to deliver buildings and may not be able to associate with the little Church of the Huron down the road, they are quite prepared to try—provided they are accepted. Whether one is English speaking or French speaking, all too often one expects others to think as oneself about what it is to be a Canadian. Too often, newcomers to Canada say they must adjust to what Canada is. Mr. LaPierre suggested this was nonsense. "Canada is nothing but the sum total of the willingness by all the peoples of Canada to live in it. These peoples enrich the idea of Canada with their own heritages. Canada is not, and should not be, a melting pot."

Sir Wilfrid Laurier once said that people travel in different streams down the St. Lawrence, never merging, always identifiable, but all going in the same direction. That is what Canada is about. The constituency must be expanded along this principle. The First Nations peoples must be involved.

Mr. LaPierre also discussed the Heritage Fairs program which is sponsored through the CRB Foundation. It is the fastest growing extra-curricular activity in Canada. This year, he said, almost 250,000 young people, between Grade 4 and Grade 10, participated in the Heritage Fairs program across Canada. In mid-March, more than 110,000 children participated in a single act of heritage—the most important and largest heritage moment in the year—in regional fairs in almost 80 different communities in every province and territory. In July, a select group of 165 participants were brought to Ottawa so their heritage projects could be displayed.

He spoke of the youth of Canada as the greatest ally for the heritage movement to cultivate. The children want to know who they are and since their parents, teachers, the school system, and the bureaucrats won't let them do that, naturally, they try to find it out on their own. They enrol in the Heritage Fair projects. In the process, they enrol their teachers, colleagues in the schools and their parents who search their attics looking for artifacts that belonged to a great-grandmother or for old documents because these children wanted to know where they came from. Through these projects, children are discovering their heritage. The children have encouraged their parents and community of adults to share their stories of Canada.

Until Canadian heritage becomes a fundamental concern of all Canadians, it will be difficult to preserve and nurture it. Perhaps, he suggested, there should be a specialty channel just for heritage. It could be owned and controlled by the Heritage Canadian Foundation, bankrolled by the big world of finance and run nothing but the stories of Canadians made by Canadians for Canadians. Since there is a specialty channel for the game of golf, it would seem possible to have a channel for heritage, he said. There could also be a marvellous Web site in which there could be interactive journeys into Canadian history or interactive games relating to heritage buildings and the life surrounding that building at a given period in history.

He concluded with another quote from Sir Wilfrid Laurier: "Canada has been the inspiration of my life... You will find the promise of tomorrow in the heritage of the Canadian people."

DISCUSSION/QUESTIONS

Michael Kluckner: As the HCF Chair, he questioned the statement of Heritage Canada not being inclusive enough. He said the problem may be more that of trying to be all things to all people. Mr. Kluckner also said that if an urban new Canadian could care about a seal, and it appears they do since the environmental movement has the largest constituency of any in Canada, why shouldn't a new Canadian care about a small historic church?

He said the CRB Foundation and the heritage fairs have encouraged more people to become involved in heritage. However, from the Heritage Canada Foundation's viewpoint, he said these heritage fairs and heritage minutes are taking place increasingly in a landscape that is indistinguishable from a landscape in suburban Los Angeles or the suburbs of Paris. "How do we, given that we all have a common goal in teaching people the history of this country, also get them to look at a sense of historic place as being part of cultural diversity?"

Laurier LaPierre: He clarified his statement by saying he was only asking if the heritage movement had gone out of its way to interest new Canadians. He answered the question about what do new Canadians have in relation to the seal by explaining that urbanism has a lot to do with it. New Canadians want to save the seals, the trees and the land because it strikes a chord within their hearts of perhaps their own survival battles. Unlike in their homelands, here they can act locally and effect globally. The ecological movement has been able to demonstrate that by not participating, humans could very well lose the planet.

Mr. LaPierre reiterated that the heritage movement must try to show Canadian youth that they are part of the Canadian heritage. "Every element of every one of their 17,000 projects contributes a moment of Canadian heritage. Have we done all that we can to interest all of these groups in the old Church of the Hurons or in other historical sites or heritage buildings?"

He added that it demands an enormous amount of work, dedication and, above all, within the leadership of the community a sense of acceptance.

The heritage movement can contribute to the development of new Canadians' appreciation of a Canadian heritage building, if it is interested in their own heritage buildings. He again cited the Chinese community as an example. He said there are Chinatowns in every Canadian city. Canadians go there to eat, to watch their exotic New Year parades and cheer on the dragon boat races. The result is that the people who are not Chinese end up sharing in the Chinese heritage. If people can be interested in a seal, they can be interested in a monument, site or building—if it speaks to them about who they are becoming as Canadians. Canada is a work in progress; it is a becoming.

As for the heritage fairs, Mr. LaPierre said he was prepared to give them up if something better could be found to replace them. If the heritage movement could find something that would interest 50,000 children and allow them to individually participate in the heritage of Canada, he would gladly step aside.

Landscape architect: An unidentified delegate suggested that, rather than looking at each other through keyholes, the answer may lie in uniting built and natural environments and looking at them as cultural landscapes that make us Canadian.

Donald Cousens, Mayor of Markham, Ontario: He questioned how to bridge the gap with hyphenated Canadians living in many Canadian communities. He spoke about Greek-Canadians in his community "who are more Greek than Canadian." He said there were Chinese-Canadians who are building a beautiful seniors' centre that will be for Chinese seniors only, Italians who built the Villa Colombo for Italians, and Jews who also built their own centre. In a community that is now very diverse with many different cultures, it is becoming difficult to bring them into the Canadian fold, he said. "They love Canada, but they also love the country from which they came. How do we bridge cultures, civilizations and peoples living in the same community?"

Laurier LaPierre: He suggested that an examination of history would show that cultures in new environments have always gathered together to protect themselves from the multitudes outside. It has been true with the Native peoples in Canada, and with the French-Canadians after the Conquest in 1759. The only people who were not hyphenated were essentially the British-Canadians, whether they came from Ireland or Scotland or from England. The first diversity occurred with the Icelanders and then the Mennonites at the end of the 19th century. With a few exceptions, Canadians came from definite, Western, white stock. Mr. LaPierre said, "It is not a weakness to be hyphenated; it's a natural part of the passage to a new land. We are now being challenged with an enormous amount of diversity. It will take us some time to absorb all these cultures and contributions so that being Canadian will no longer be hyphenated. Give us time."

Session 5: Education

TOPICS: The preservation of built heritage is dependent on an informed and supportive public. How can the heritage community and, in particular, the Heritage Canada Foundation, strengthen our formal and informal initiatives to achieve that goal?

Presenters:
Martin Segger, *Director, Maltwood Art Museum and Gallery, University of Victoria*
Judy Oberlander, *Director of the City Program, Simon Fraser University*
Louise Crane, *Heritage Resource Consultant, Calgary*

Martin Segger brought twenty-five years of "heritage business" into focus by celebrating its progress. He said there now exists the Heritage Canada Foundation, various provincial trusts and foundations, local grassroots groups, city civic trusts, the designation process, the preservation of railway stations, and more. Yet every time the heritage community meets, it recites a litany of what's wrong and what needs to be done. It is constantly trying to reinvent itself.

In reviewing education in the heritage sector, he posed four questions. The first was, education for what?

In a general sense, the heritage community started out with an appreciation of history, the legacy inherited as a result of Canadian history. One thinks of the incredible range of publications that have come out over the years, spearheaded or mastheaded by the heritage foundations, early magazines and newsletters, and the many others that have grown up over the years through provincial trusts, and how that has ricocheted out through the popular press. One can hardly pick up a newspaper today without seeing some feature on a heritage building or site.

Speaking about his experience with Victoria's preservation movement, Mr. Segger said that educational programs helped motivate preservation action, which then resulted in the implementation of provincial and municipal legislation for the preservation of monuments, structures and landscapes. Victoria has more

designated buildings than the rest of the province put together. One has to conclude that has been a success story.

Educational training for stewardship has grown from almost nothing twenty-five years ago to some twenty university-based and college-based programs that contribute to the training of heritage professionals and the professional organizations such as the APT and ICOMOS Canada. Mr. Segger said his own program, the Cultural Resource Management Program at the University of Victoria is an outgrowth of that movement, and now offers training to heritage professionals world-wide.

The second question he asked was, education for whom?

At the base level it is the general public. There is a need to educate and inform the popular commons, without this, one cannot build anything else. Heritage Canada has been a major contributor in this area, with its program for youth, Heritage Day celebrations, etc. The next level is informing the public system. In British Columbia, for example, there are at least three points in the current educational grade school curriculum where local heritage resources come into play and become the focus of study. The third level that reinforces the stewardship element is the professional cohort. The introduction of heritage conservation into formal university-level programs has produced professional planners, architects and even lawyers. Now, one sees, particularly in the profession of architecture, this has become a part of the curriculum. Finally, education must be for community leaders to influence the political agenda. Numerous publications and forums such as this conference at the local, provincial and national levels have contributed to community leadership, and that has resulted in systemic change in legislation across the country.

The third question is, education by what means?

One can quickly go through a whole series of categories here. The popular press, the old and new electronic media, academic resources, professional resources and associations have all contributed to a growing body of literature and case studies. The subject matter itself—the preserved buildings, urban landscapes and monuments—becomes an educational resource that is interpreted and used as the core of what the heritage community is talking about. The emergence of the "info-tainment" cable television channels has created a constant need for material. Heritage topics have become big-ticket items for the History Channel and Canadian-made products.

The final question is, education—why?

Mr. Segger said he thought pleasure was the first reason. People noticed that they could experience and enjoy a varied and decorated environment. Look at how the urban landscape has changed, he said. The failure of the modernist agenda in favour of much more free and referential architecture has to be an outgrowth of pleasure. It was followed by profit. Certainly during the 1980s, heritage activists argued vehemently that heritage preservation has a positive bottom line. Marc Denhez's work in that area, through Heritage Canada, must be acknowledged. Finally, utility has become a motive. The use of heritage in generating a whole new level and type of tourism is one example of this.

Mr. Segger stated that there is the issue of values to consider. Everything one does is based on a system of values and beliefs and the ethical environment around that. As the heritage community faces the next twenty years, it needs to examine what has been done. The post-modern values have shifted in favour of two global concerns. One that the heritage movement has participated in as a peripheral interest group is environmental conservation: the need to live and tread more lightly in the world. The second area, one in which Mr. Segger has been involved for eight years, is the avoidance of armed conflict. He said that the movement of a society away from a culture of violence towards a promotion of world peace has a parallel at the local level where groups deal with groups in a much more amenable way. In this, there are elements of an emerging strategy. Searching the Web, one can find the McArthur Foundation, Carnegie Foundation and others that are pouring a lot of money and huge research efforts into looking at how society can evolve to a world where matters are solved non-violently. These foundations highlight the importance of media, but unfortunately, their concept of the media rarely involves museums or heritage sites, although both are important mediums of education and cultural transmission.

Given the critical role of education, he said that heritage can be looked at as a mentor: "The markings of our elders, as it were, are on the landscape."

He concluded that society must look beyond the history of heroics that is the prime mover of history to appreciate those who have taken a more critical view, and examined times and places and the surrounding influences. It is necessary to re-examine the legacy of science, discovery and technology as it is treated almost as a deterministic type of history. Heritage sites quite often illustrate technological advances, but is it progress? Why? The aesthetic construct itself needs to be redefined. What is beautiful? Tall skyscrapers or Rattenbury's early hotels in the Rockies that are a "smaller footprint" in the world? The sweep of history must be questioned. Where did historians go wrong in the details? Post-colonial globalism—the wash of history—must be confronted. Can individuality be retained? In Canadian history and heritage, can local solutions to local problems be found without being swamped in the media wash?

Judy Oberlander presented the view that everything the heritage community does is education. Whether heritage activists are talking to the local MP or writing letters to city hall, or trying to keep a boulevard in a neighbourhood or protesting demolition of a building, whatever the action, they are trying to educate someone about something related to heritage conservation. Assuming the premise that the preservation of Canada's built heritage is dependent on an informed and supportive public, how can formal and informal education initiatives be strengthened?

She said that given the social, cultural and economic agenda of this country, it is a luxury to be able to have this heritage conference. There are many pressing needs, but heritage conservation can be a part of the solution.

One can think back twenty years to 1980, but what is going to happen in 2020? Many of the questions asked then of heritage specialists are the same ones being asked now. These are the "constants": someone has bought a house and wants to know "What does it mean if my building is designated?" or "How do I fix my roof?" Twenty years from now, those questions are still going to be asked. And yet, there are some other questions that are now being asked.

As Heritage Canada goes through a consultation process, and as the federal government looks at the concept of a National Trust, there are some opportunities for education. In the Australian National Trust context, there is a constant push and pull between the different levels of government. The reality is everyone is a citizen of a neighbourhood, a community, and a municipality, a province or territory and of Canada. People want access to information and want to get involved. Partnerships are essential if the heritage movement is to move forward in a public way.

Ms. Oberlander also posed four questions: "Why do we believe in education? Whom are we educating? How do we intend to do this? Who are our potential partners?"

Without an informed constituency or a community, there will be no political support. Instead, politicians are going to look for the electorate to come and lobby for all different kinds of issues. There will be no financial support, no social, cultural, or economic frameworks to support heritage conservation and, in the end, no public supports. Therefore, it becomes a circle.

The challenge within their heritage community is not just to move with the times and develop engaging educational strategies that reach out to new audiences, but to not be afraid to change. One may need to go in another direction. Ms. Oberlander also suggested that it would be useful to look from outside the heritage conservation movement back into the movement to really see what is happening. People laugh about the hysterical preservationists—the blue-haired ladies in tennis shoes at 7 a.m. in front of a bulldozer, stopping a development, but this is part of what is happening, what needs to be done. However, there are other ways to move ahead.

The current issues in urban centres are very important. In many areas, the concentrations of heritage buildings, for example in the north end of Winnipeg and the downtown east side of Vancouver, are amongst the poorest neighbourhoods of our country. Many of these neighbourhoods have either been abandoned or forgotten or have such enormous social challenges that heritage conservation is not even on the radar screen. The heritage community has a responsibility. Often these neighbourhoods are in close proximity to the central business districts and there is an economic impact in not addressing these issues.

She said it was interesting how many organizations have become involved in stopping urban sprawl and big box retailing, and are pushing to maintain the quality of community life. Twenty years ago, heritage activists thought in terms of main streets and downtowns, but not in the same way. This should be another part of the heritage conservation agenda. "We can't be everything to everyone, but we have to make some choices."

Ms. Oberlander said her Internet search resulted in information on seven National Trusts. She was impressed by the Australian National Trust network on the Web and recommended it highly, especially the discussion of Aboriginal and Torres Strait Islander heritage, and the efforts that are being made to integrate different members of the community into the consultation and reconciliation processes.

The U.S. National Trust also has an enormous Web site with information based on how to engage people in their communities. It covers such matters as preservation advocacy, news bulletins from across the country, the endangered buildings program, tax credits and a community partners program. It also had information on the 20-year-old Main Street program and community-based preservation development projects for Afro-Americans, Asian-Americans and Hispanics.

She said that much of the education information on the English National Trust system, also in Scotland, Ireland and Wales, is geared towards young people. It uses the National Trusts' sites as the focal point and then offers many programs, workshops and seminars on how-to subjects such as plastering and masonry. In this system, the national level trust is much more conceptual and looks at property-based matters, while action and advocacy is done at the local level.

The National Trust of South Africa, the newest member in the family of international trusts, was created in May 1998. Its role is mainly one of co-ordination of heritage information. It has directories to all the local, national and international heritage organizations regarding legislation, funding, practitioners and international issues.

Ms. Oberlander said the Internet proved to be a useful resource tool that could be quickly accessed. Twenty years ago, she said, heritage activists used typewriters to send letters because it was too expensive to phone.

Whom are we educating? Is it members of heritage preservation commissions, real estate developers, building owners, elected officials, contractors, architects, engineers and planners, government agencies, community organizers, historians, conservators, historic site managers, lawyers, tourist operators, elementary school children, teachers, parents? Basically, it is everyone. If one is to have an informed and supportive public, it must be everyone. The heritage community needs to broaden its horizons and reach out to people who, as of yet, feel that it is not an issue important to them.

In the last twenty years, there has been enormous growth in professional heritage conservation programs at universities and colleges, and professional development seminars. In many cases, members of the public are now saying that they feel things are being taken care of because someone else, "the professional" is looking after it. This is something heritage people need to be very aware of in terms of moving forward. In a way it is like leading from behind, the heritage movement has to be with the constituency and not just out in front.

The next question is how do we educate? There are programs for the young and old, education kits for classroom use, heritage week activities, political lobbying, seminars, workshops, publications such as Heritage, mid-career professional development programs, Web sites, courses at universities and technical colleges, newspaper articles, conferences, and yet, a forum such as this one is probably the key tool. She stated that "all the technology in the world isn't going to help us as individuals give something of ourselves or have this conversation on what we are going to do to move this forward. Let's not forget the human contact." Ms. Oberlander discussed her City Program at Simon Fraser University. Since 1992, there have been 3,000 people participating in public discussions and workshops.

What do DuPont, Teflon, Fabric Protector, *Country Living Magazine*, the History Channel and Banana Republic have in common, she asked conference members. These are all the corporate sponsors of the U.S. National Trust for Historic Preservation. The heritage movement needs to start thinking along these lines. Heritage Canada has done that in terms of its work with Transport Canada and with Canada Lands. However, other partners must be engaged. Corporate social responsibility is the buzzword of the year 2000. There are individuals and agencies that want to make a difference in their communities. Just as the environmental movement has been able to capitalize on that, the heritage conservation movement needs to look for other sponsors. She said it was not necessary to have logos on absolutely everything, nor go to a sponsor that may compromise some of the heritage conservation values, but it is time to look at different ways to finance programs.

The heritage movement has worked closely with different media groups. In the last 20 years, it has come an enormous way to make this happen, but much more has to be done. As a heritage spokesperson, one must avoid the in-house jargon and explain what heritage conservation really means in ordinary language. It cannot just be a club of just those activists who believe in heritage conservation and want to move an agenda forward. People in other fields must be told about why heritage matters.

To help Heritage Canada examine what a national trust might look like, Ms. Oberlander suggested that it needs to select a few key focal points. It needs to remain flexible and open to newcomers to this country and to the heritage field. It needs to work with the Aboriginal communities and with people who do not speak English as their first language. She said that, in Vancouver, 40% of the people speak English as a second language. This is a reality of Canada.

She also recommended that Heritage Canada create unusual partnerships, talk and work with the media on a regular basis and not just during a crisis, work in a consultative manner, use the new technology of Web sites, videoconferencing and other ways to disseminate information, and look at training and education also from a different perspective. She said that the heritage movement needs to be bold and imagine new ways of making things work, rather than relying on old processes.

Louise Crane, who works with the Calgary Board of Education by creating resource tools, extension programs and by providing resource people, said that when budgets are cut back, unfortunately, people involved in this network are also cut back. If it is somebody, say, from Loughheed House or from Fort Calgary, then budget restraints mean that, for the sake of the preservation of their own institution, they can no longer offer these services.

She also reviewed a number of heritage sites on the Internet, although there were few Albertan sites available. She said her favourite example of educating on the Web came from a school in Missouri that had a Métis learning package. The school has tracked the story of little Metchief and his journeys around the world and, so far, responses have come back from some 40 countries. She recommended it as an excellent site for children and for its focus on a small culture within Canada.

Ms. Crane found the American Heritage Education Foundation also had an excellent Web site. The Houston School site offered an American heritage month, and though there is a Heritage Day in Canada, "the idea of a heritage month was much more grasping." This school held special events including essay contests, book fairs and daily morning broadcasts by students about their favourite American. They also held plays and band concerts celebrating the music in their heritage.

The Heritage Education Network site described itself as being for educators, museum staff and "anyone who recognizes the many and varied lessons of history that are all around us." Its motto is discovering the heritage of your community. This Web site linked to many other great suggestions on using built heritage to enhance curriculum, including "The cemetery: history written in stone."

Ms. Crane said there were various Web sites on the popularization of history. In Alberta, one site from Leduc had been developed for students to look up links to do their homework. Child-friendly Calgary had a site on its adopt-a-building program. The school involved with this program has students select a building from a number of heritage buildings in the city. Then classes are held in the building so students may learn everything from steam heating to architectural concepts. She concluded that many things on the Web offered optimism for education in the future.

Recalling a recent visit to Coleman to learn about the town's rich history and view its many historic buildings, Ms. Crane said many were seriously neglected. "The buildings that had proud heritage declarations no longer have those stories to tell. If students were asked to report on these buildings, would these buildings still be standing by the time they put the curriculum together? Would a national trust make provision for municipalities and governments to take ownership, not only for the preservation, but also for the upkeep of these education tools?" she asked conference delegates.

Ms. Crane also discussed her concerns and raised some questions relating to a Métis site she has been involved with. The first is Buffalo Lake Métis winter camp and the Trail Creek Cemetery site. The Métis Nation is working with various government departments to have these sites officially designated, and for that they should be applauded. However, the Métis Nation is in a political and management crisis state. Does it have the expertise to preserve or even develop these sites? Will its political immaturity, and in-house battles between local Métis communities and the provincial office affect the access to these sites? Will the true stories of these sites be told? Or will they continue to focus on the "Gabriel Dumont slept here" syndrome?

She said that while Gabriel Dumont had accomplished many things, although not as many as he is given credit for, there were other Métis people who probably contributed more. During her research on more than forty Métis heritage sites in Alberta, she found a wealth of Alberta-bred Métis that have not been celebrated.

Ms. Crane, a Métis herself, asked several tough questions of the audience. Will the national trust stay apolitical? She said that for the Métis and Aboriginal community, this is an issue they constantly face. Will the national trust be involved in heritage education and accuracy of historic information as told to the public?

There are teepee rings in northwest Calgary that may have been disturbed by the development of Tuscany and Tuscarora. A learning circle has been established to see if they still exist and what their story is. The reports received by the Alberta government deemed these sites insignificant and they may not warrant protection. Although they are scattered and isolated, they are in the direct line of the Paskapoo buffalo kill site. She offered the theory that perhaps the site had other significance. While touring the area, she identified more than 40 healing herbs, including a small patch of sweet grass and virgin prairie, and wondered whether all the parties involved would be allowed to rate the significance of the site if there was a national trust? Would it ensure the appropriate time needed to educate the developers, public, bureaucrats and politicians about who holds significance to these sites?

Ms. Crane spoke about a group in St. Albert that is attempting to save several styles of Métis cabins. She wondered who would determine how beautiful these are? With few logs still standing, they are not what people would call beautiful, but their stories are. The local government has created a lot of barriers despite the local historical society's education programs. Sometimes, she said, the Métis feel like they are hitting a brick wall. How can a national trust support these heritage conservation efforts? Will it provide another avenue of procedure or recourse to the local historical societies?

She said her connections with national funds in the past have not been good ones. She has worked with the Aboriginal Healing Fund and was directly involved in applying to the Millennium Partnership grant fund. Both of them have let Canadians down. Again, she raised some questions. Is a national trust going to provide direct benefits to the community and community-driven heritage programs? Or is it going to pay for an expensive administration program with only a few close and friendly projects? How will the stakeholders be educated on such programs? How will a national trust be accountable and what steps will be taken to ensure that all the information is available to everyone?

Ms. Crane offered a few suggestions on how the heritage community could inform and enlighten the public. The Heritage Canada Foundation should provide support in as many ways as possible to encourage the telling of all the stories of Canada's heritage. This includes training teachers to use heritage resources by developing training programs for educators at all levels, introducing preservation education concepts at all school levels, lobbying for adequate seed money and funding to support the introduction of heritage education into the education system. Heritage Canada could also create a clearinghouse for heritage education material and ideas, and encourage existing Canadian heritage Web sites to position themselves in the top 10 search engines. It could create a system that would streamline administration and the accountable process. It could create a trust education system that would make all Canadian heritage projects accessible to all.

In her Aboriginal culture, one definition of an elder is a person who not only has been entrusted with the knowledge, but must also be prepared to share the knowledge. She challenged the Heritage Canada Foundation to find ways to get all Canadians to become elders, to support and encourage the storytellers, to realize and honour their role in society.

DISCUSSION/QUESTIONS

Linda McDowell of Winnipeg suggested that if the heritage community wants to have heritage issues included in the school curriculum, there was never a better time. Right now, she said, there are two large consortia working on a new curriculum in many areas, but particularly in social studies. The Atlantic consortium is further ahead than the West, but there is still time to look at what they are doing and make it include what is needed.

Speaking as a specialist in teacher education and curriculum design, Ms. McDowell described the project in more detail. The Western Canada curriculum project includes the three prairie provinces and the three northern territories. At this point, British Columbia has only observation status as they have chosen not to participate. One cannot assume that provincial departments of education put history and heritage at the top of the list. It is the fourth in the basic core subjects to receive any kind of curriculum development. The money is running out and so is the enthusiasm, so the heritage community will have to push. She advised heritage organizations to "get in there and pitch now."

Ms. McDowell said educators had to fight in Manitoba because one of its previous ministers of education decided that Canadian history should not be compulsory any more at the Grade 11 level. They fought for four years with a lot of support from history groups and heritage groups, and from museums. Finally, the minister caved in although she said it was because of the veterans. She ended with a warning: "You must remember that politicians may not always want us to teach history."

Helen Edwards, a mother and classroom volunteer in Victoria, noted that the education system in British Columbia has noticeably deteriorated. She said, "It seems that history, and the value of what has gone before us, has gone by the wayside as we rush to teach everyone how to use the latest piece of computer equipment. If we don't know where we came from, how do we know who we are?"

She said children are like sponges that just soak up the information, but that there is a problem connecting with the teachers. She asked whether there is a role for a heritage trust in reaching out to teachers?

Louise Crane: In response, Ms. Crane said that she participated in a very successful re-education of all the teachers in the Lac La Biche area. She helped develop curriculum and extension programs for every subject. There were math classes held at the Mission. There were language arts students who came in and wrote stories about their history. There were arts students exhibiting local art since many of the early pictures of the Lac La Biche Mission were done in media other than photographs. She said it was a case of looking at every subject and analyzing how to apply history to it, how to improve their teaching skills with a historic twist.

Judy Oberlander: One of the things she said she tried for two summers at Simon Fraser University was to teach a credit course on the built environment in the Faculty of Education. The neighbourhood was used for fieldwork. The teachers were taught how they could integrate this heritage material into their curriculum.

Ms. Oberlander said it was worth lobbying at different levels, whether it was at professional development days through the school districts or through teaching teachers in summer refresher courses. She said that a lot of work that the CRB Foundation has done in using curriculum materials has definitely opened up some discussion. There are some encouraging signs, but much work still needs to be done.

Pat Frey, a British Columbia public service manager, said he had come across some statistics that "speak very forcefully to this issue of the relationship between heritage and the education system." There are 29,000 social studies teachers in British Columbia. That group is by definition, the single biggest component of what could be the heritage delivery system in the province. Yet, at the end of the day, they are profoundly under-utilized and ineffective at bridging the gap.

Another fact is that in District 61, which is probably typical of other school districts, 51% of teachers are eligible for retirement within the next three years. He said that this will create a huge turnover of the educational delivery system in the next few years and the people coming on line will have different approaches to dealing, among other things, with the history of Canada.

In the last few years, the heritage community has been working with the Ministry of Education around issues related to Web site technology and how it can work more effectively with the school systems in getting heritage into the curriculum. From the viewpoint of the ministry, school districts and teachers, if one cannot connect content to learning objectives and the curriculum, "one is simply not on the radar screen." One might have a wonderful heritage product, but it won't be used. Teachers more than anyone else are open to potential material. However, without a structure on the Web for getting authenticated information to the teachers, they won't use it. The heritage community needs to recognize that to have an impact on children within the education system, it must work with the ministries of education to build these courses structurally into the system.

Jim Bezanson succinctly asked, "What are the gaps in the educational materials that are available? What format is best for dissemination? Should we deal with the constants first?

Judy Oberlander reaffirmed that the constants are always going to be there. She said that there is always going to be someone else purchasing a building and wanting to do something with it and phoning city hall for information. The heritage community needs to develop tools and techniques like the fact sheets and be able to disseminate them in a clear way. It needs to help people get on board, then they will lobby at the local level, and the political will will increase. There are easier ways to disseminate information than there were ten years ago, but one can't forget about the constants.

Regarding gaps in education materials, she said it helps to ask whom the heritage community is trying to educate. There was conversation a few minutes ago about using social studies teachers. This was something Heritage Canada looked at in the mid-1980s when it focussed on youth education. There is still an enormous need for youth education. This is a constant. One must work with the networks already created rather than trying to re-create them within the heritage movement. Part of the gap is not in the information, but in the dialogue. It would be useful to have an e-mail button on the Heritage Canada Web site so those members could immediately respond to issues.

Louise Crane: She mentioned two main gaps: the lack of printed materials in the Aboriginal culture and the lack of co-ordination of materials. There are all kinds of information on the Internet and many thousands of books, but there is nothing co-ordinated.

Don Smith, a University of Calgary history teacher, suggested a different idea. He said that another way to reach the public could be through encouraging site orientation rather than the current human-centred view of the past. If one looks at *Maclean's*, every few months it runs a feature on Great Canadians, and the History Channel is largely about individuals. He said the heritage community has to re-focus and think in terms of sites; why not have urban biographies? Why not get into the story of a building such as the Loughheed House?

Martin Segger responded that the urban biography is a movement very much promoted in the U.K. Although there are some urban histories available in Canada, it is not quite the same thing as talking about a building or a city as a personality. He said he was in favour of moving away from the personality-driven, star-system of history. The urban biography is one way of doing that. It is an area that could be richly mined.

Session 6: Information

TOPICS: What are the current sources of information and advice in the built heritage field? What are their strengths and weaknesses and where are the gaps? How can we work together to create reliable, accessible, up-to-date technical information and advice in the heritage field? What role could Heritage Canada play in this area?

PRESENTERS:
Frits Pannekoek, *Director, Information Resources, University of Calgary*
Margaret Carter, *Principal, Heritage Research Associates, Inc.*
John Gordon, *Chief of Culture Surveys, Statistics Canada*

Frits Pannekoek opened with an example of how limited the access is to information databases. He said that a woman came to the Health Sciences Library at the University of Calgary, where he works, asking for the latest scientific literature on cancer because she had just been diagnosed. She was told that, although the information was available, she could not have access to it because the University's licence for that electronic information restricts it to the faculty and students. This is happening in other subject areas as well.

He said that while everyone thinks the Internet has made information free, what it has done is "commodify" information. He said another thing that is happening on the Internet is the "dumbing down" of information because people want to have the instant view. He also regretted the absence of Canadian content on the Web.

Mr. Pannekoek said that increasingly information on the Web is pay-for-view. Some might not mind paying a dollar a site, but it costs much more than that. For example, Early Canadiana On-line, one of the best sites in Canada with full-text material, will cost the University of Calgary's library $13,000 a year. If one needs the latest chemical formula relating to heritage brickwork off the Web, it would cost $40,000 U.S. a year for individual access to the *Chemical Abstracts* site.

Secondly, he said, few resources of quality are free. There is this illusion of democracy that information is now available to everyone, but it is not. The University of Calgary, which used to be able to afford a lot of the information, now only can afford 60% of the quality resources, and that includes a lot on heritage. There are only two universities in this country that can afford everything. He said that the resources are so expensive that Canada *has* to act as a nation in the acquisition of this information and in the creation of cultural content, because if it does not, the heritage movement will surely be at a loss.

In discussing Canadian content, Mr. Pannekoek said there are currently several problems. First, virtually all of the free information on the Web is through what he calls the tourist gaze, showing only the picturesque shots. There is no look at the seedier side. There is also no quality control. One doesn't know who is responsible for providing the information. Even the National Library Web site lacks authentication of authorship, he said. However, he pointed to the Salish site as one of the best Canadian-content Internet sites. It is authored, has full text and complete bibliographies. Children and adults can use this site. Two others show the direction that heritage information must head in if the heritage community is to serve Canadian youth and communities well. The first example is Early Canadiana On-line. It intends to do full-text searches of all Canadian materials. It is now up to 1920. Children already use it; they can read about Franklin's voyages or the Jesuit Relations. This site is also widely used by teachers looking for information. If one has large volumes of full text, whether it's on buildings or any part of Canadian heritage and puts it on the Web, then it becomes a starting-point to assist educators. He said there is evidence that this is what teachers are looking for. However, the tragedy with this Canadiana site is that, in a typical Canadian way, the money behind it is from the American Mellon Foundation and this site was largely digitized in the United States. So culturally, Canadians do not even manage to fund it or reap the technological benefits and experience.

In response to this lack of quality material, a new Alberta Web site is being developed through a partnership of the Nickle and Glenbow museums, provincial archives, and the universities of Alberta and Calgary. Called "Our Heritage, Our Past," it attempts to provide access to Alberta folklore, all architectural drawings, all art, aerial photographs, maps, newspapers and local histories, in full text where possible, and searchable. There will be about twelve million images altogether when completed.

The site went up in early September with 250 full-text, searchable local histories gleaned from Albertan newspapers. He said these were important in the heritage of this province because it was so late in having an archive. There are 443 newspapers from first publication to 1950 and all will be put up over the next two years. This is an incredible task, but it can be done. The appetite within the community and the private foundations to do it is there. It has not been difficult to raise the million dollars to start it off.

Mr. Pannekoek said that many teachers have already been using it. There were some 800 hits in the first two days. The length of stay is very long and the amount of information downloaded is significant. People are not just surfing around, they're downloading large chunks of material. Obviously, it is meeting a need.

He suggested that this may be the direction to go in. There are a number of archives, libraries, publishers and, of course, Heritage Canada that could have roles in the creation of meaningful content for the Web. The public bodies of various kinds could also be more positive in their approach to making information available. There is still a sense of reluctance, particularly from public archives, in making full texts available. He said another source for content could be from the publishing industry. Publishers do have expertise and they want to link with the heritage movement in providing information.

Mr. Pannekoek said that, in a perfect world, he would like to see Heritage Canada continue to fight for free access to Canadian historical information in government information. He said there is a need for a quality portal for heritage information. Heritage Canada has some information, but there is less quality assurance than is preferable from a research standpoint. He suggested a Web site should have fresh links, some transparent assessment of the information provided and transparent authorship. He recommended that a list.serv would be useful for discussions on Canadian preservation and heritage.

To conclude, he said that nurturing connections and encouraging standards are very important. Canada has some of the best pipelines in the world for information, and children will use whatever is out there. The moment is largely American. If Canadians don't do something about it, if the heritage community doesn't put up the content and put it up quickly, like in the next two years, a generation will be lost and the heritage movement will not be able to recover.

Margaret Carter said the heritage field has its own information to share with a greater Canadian society because information is fundamental to heritage commemoration. The links are embedded in the international conventions under which heritage professionals work. She quoted from *The Venice Charter*:

> Article 3. The intention in conserving and restoring monuments is to safeguard them no less as works of art than as historical evidence. Article 7. A monument is inseparable from the history to which it bears witness. *(ICOMOS, The Venice Charter, 1966.)*

Heritage sites are, in themselves, massive immovable artifacts that embody information about the past. Moreover, since sound heritage practice is based on knowledge rather than conjecture, heritage professionals collect information in the course of their work—and generate it as that work is performed. She then quoted from the *Appleton Charter*:

> The better a resource is understood and interpreted, the better it will be protected and enhanced. In order to properly understand and interpret a site, there must be a comprehensive investigation of all those qualities that invest a structure with significance. This activity must precede activity at the site. Work on site must itself be documented and recorded. *(ICOMOS Canada, The Appleton Charter for Protection and Enhancement of the Built Environment, 1983, Section D.)*

Today, having just moved through a period of tight resources, the heritage field is placing increasing emphasis on heritage value as a tool for the selection and management of cultural resources. For those not familiar with the concept, *heritage value* is a much more dynamic version of what used to be called *heritage significance*. Very briefly, if "heritage is anything inherited that we value and wish to preserve for future generations," as written by Paul Bator, then the investment in heritage resources is done for a reason. They are evidence of a quality, an identity, an accomplishment or an occurrence that Canadians think should be remembered. They will only serve as a vehicle to communicate their message if we take care to protect what is valuable about them.

Another way of saying that is—there is no point in building a special vault to exhibit the Mona Lisa if a conservator corrects her smile. Ensuring that a heritage resource survives is not enough. It is the features that embody its cultural message that matter. Protecting a cultural resource can be a costly investment because it is one taken on over the long term. And so it is important, as a society, to choose carefully what is to be retained.

What resources have cultural heritage value?

Twice in the past ten years, Ms. Carter has looked at the resources Canadians have chosen to protect in the name of heritage. Many umbrellas have been used as the range of heritage protection tools has grown. The nature of the sites Canada considered to have heritage value is particularly interesting. This has changed since the post-First World War days when heritage commemoration became a public concern. The table below shows the nature of the resources

Year		Type of sites External context	relationship to our lives
1920s	ancient fortresses	beyond memory	post-WWI confirmation that Canada, too, has a past
1930s	archaeological remains		
1940s	plaquing programs museum houses	sites that reflect political and cultural determinants	Canada as a nation (not Imperial Dominion)
1950s	historic sites	life-defining frameworks	
1960s	underwater archaeology		
1970s	heritage buildings heritage districts	sites that define urban experience—immediate	prosperity, renewal expansion
1980s	industrial heritage natural heritage	sites that round out immediate environmental and cultural experience	multiculturalism land claims technological change
1990s	cultural landscapes sacred sites		
2000	settlement patterns international sites	remnant & precious sites new glasses to see with	global village comprehensive tools land management

that were protected, and the historical contexts that have caused people to consider them to have heritage value.

From this chart, Ms. Carter said, it is clear that Canada's perception of heritage value has responded to both its position on the world stage and to changes in Canadian life.

The State of Knowledge

It is interesting to note that the type of historic sites that were initially secured reflected existing knowledge. They were sites whose presence was known. Their historical value could be readily demonstrated by existing scholarly research. Canadians have always recognized respect for the past as a mark of citizenship. Joseph Howe once said:

> A wise nation preserves its records, gathers up its monuments, decorates the tombs of its illustrious dead, repairs its great public structures and fosters national pride and love of country by perpetual reference to the sacrifices and glories of the past.

During the 19th century, this patriotic link was filled—and limited—by its allegiance to the British Empire. Until their experience of being in Europe during the First World War, most Euro-Canadians regarded this country as too new to have a past to value.

By the end of the Second World War, however, the Government of Canada had not only become actively involved in heritage commemoration, but also was anxious to use it as a basis for nation building. Long before the war was over, officials were planning to develop a historic site on the ruins at Louisbourg as shared roots for French and English cultures to build a nation. During the immediate post-war period, the challenge was to identify and secure known sites to teach Canadians that they had a history—a task that was largely filled by raising plaques to the Fathers of Confederation. As J.M.S. Careless remarked in 1962 with reference to a historic trust that had been proposed to mark Canada's Centennial:

> The marking of historic sites and structures offers a valuable means of stimulating the citizen's awareness of the past.... Markers are vital but the best marking program may remain only a nod to history, if not coupled with effective measures for the preservation of the resources of the past. If one picture is worth ten thousand words, one preserved structure is surely worth a great many plaques announcing that something once stood here. *(J.M.S. Careless, Government and Historical Resources in Canada. A report prepared for the Second Conference on the Development of Canada's Historical Resources. Victoria, May 10-11, 1962.)*

In the affluence of the late 1960s, the number and nature of sites identified for potential heritage commemoration parted ways with the existing state of academic scholarship. Largely, this was due by public pressure stirred both by Centennial patriotism, and by the threat that impending redevelopment posed to known community resources. For the most part, the sites recorded and examined by newly formed, publicly funded heritage agencies, were sites proposed by the general public—by ordinary people in local communities who were familiar with their own heritage.

Ms. Carter said that since she was a player at this stage, she would comment upon what was done and its relationship to information. She was head of Architectural History at the Canadian Inventory of Historic Building from 1975-81. Despite all its problems and inadequacies, the real value of initial inventories like the Canadian Inventory of Historic Building (CIHB) is not that they were comprehensive or accurate – *it is that they existed at all.* She said they provided a way for her to see what was there – really, to look around for the first time.

Ms. Carter recalled the day she learned to "look." She said, "I was walking down the Sparks Street Mall when one of my colleagues said, 'look up,' and there it was—a whole parade of things I'd never seen before. I think what happened with the CIHB was that we trained a whole generation of Canadians to 'look up.' " The CIHB turned out to be a marvellous training ground for the initiation of professionals—and they still staff the heritage and environmental fields today. The heritage community already has a means of introducing a new generation to dynamic performance in heritage, but it has to be used to recruit the next generation.

In all, the CIHB collected a standard five photographs and tombstone information on more than 220,000 buildings in all parts of Canada —most of it during 1965 to 1975. Last year, a valid statistical sample was used to determine how much of this inventory base remains valid. Statistical samples of buildings recorded in urban, suburban and rural areas in ten centres across Canada were revisited, with some surprisingly consistent results. For example:

A. What portion of the early building stock is stable?
In the 25-30 years since, 92% of the sample was recorded, 56% has an appearance that has changed little and 59% serves the same apparent function.

B. How much has disappeared through demolition? What kind of buildings are we losing?
We have already lost 23% in urban areas, and 21% in smaller centres across Canada. We have lost most buildings in areas of high industrial growth, and they have been primarily commercial buildings (33.3%) and industrial structures (26.3%).

C. How much of the older building stock is in danger at any one time?
Information gathered suggests that 3.4% of older buildings are in danger from neglect, while 10.9% are in danger from redevelopment, making 14.3%.

What is particularly interesting about this figure is that the number of buildings currently in danger in urban and suburban areas (13% and 11% respectively) is much smaller than the 21% that now appear to be threatened in rural areas where there are still few heritage programs to protect them.

D. Has heritage awareness had any effect?
This survey did not really get an answer to that question. At least 7% of the structures revisited had been commemorated in some way. Ms. Carter said that this exercise has gathered some useful information. As Canadian

communities turn to computerized mapping, the initial heritage inventories have meaningful data on the evolution of the built environment to contribute to future community planning.

Ms. Carter returned to discussing the early phase of collecting information on heritage buildings. At CIHB, the initial job of the research staff was to find out something to explain what these early buildings represented, and why they looked the way they did. Although CIHB historians were in every region of Canada, they all encountered the same problem — finding any information to use at all. On a building-by-building scale, the historical data sought was far too microscopic to be found in either the published histories of the time or in the type of primary source materials most historians were using.

She emphasized this early research phase so conference members could understand how slowly and carefully she and the research staff "built today's understanding of Canadian heritage." As more questions were asked, archivists began to save more documents that contained a broader range of evidence – so today, there is a much better base of documentary source material from which knowledge of the built environment may be gained. The information generated and compiled for heritage purposes alone has made a major contribution to the perception of Canadian history.

Ms. Carter suggested that if one thought of the past as a picture, like one on a TV screen that is made up of dots, finding information on a heritage site is like colouring in a single dot. Each dot is associated with a specific people and the space in which they lived their individual lives. Although CIHB staff coloured every dot to the best of its ability, the space to be filled was so big it often seemed a futile, ridiculous exercise. It took many years before there were enough dots to provide a hazy picture. As the picture has become clearer and sharper, it looks quite different from the Canadian history earlier scholars could see. Heritage work has been spurred on as much by environmental pressure as by political and social agendas. This has made it impossible to overlook the presence and contribution of people and activities—most notably, those people are First Nations and ethnic minorities—whose legitimate role was previously ignored.

Therefore, not only does heritage value change with the state of one's perception and state of one's knowledge, but the state of knowledge changes with what one decides to value and how to perceive it. What one values and knows likewise influences the state of perception. It is a self-perpetuating cycle. It is, in fact, the dynamic role that heritage has to play in our society, and all of it involves information. In considering a heritage trust, it is necessary to take a closer look at information in a heritage context. Most of the pressing questions today are quite specific and she itemized them as:

Does the heritage field hold information? Ms. Carter answered affirmatively. The CIHB has collected information from site locations and documentary sources for every site it has worked on – and there are 158,296 heritage sites under legal protection in Canada. There is some information on every one of those sites. More than that, an increasingly sophisticated nature and level of information has been collected for each site at a different stage of site development activity. There are four levels used: inventory/identification, assessment/evaluation, preservation/conservation, and interpretation/presentation.

While all heritage sites have passed beyond the initial identification stage, most have not been fully explored and developed in all of the above ways. Several rounds of investigation information do, however, exist for many of them.

Does heritage information make a useful contribution? Again she said the answer is yes. It has already been shown that it makes a useful contribution to environment management. It also plays a critical cultural role in helping Canadians to see themselves as individuals linked to the historic patterns of a greater community.

The heritage field has operated with one principle that has, to date, worked extremely well. The idea of using a long-term site file has kept the work cost effective. The idea is this. As evidence is collected and work is prepared, that work is filed and used as a platform for conducting future projects. New work on a site picks up where the old work left off. In terms of historical research, this has meant extensive cost savings because it has reduced the need for repetition of earlier work to gain an understanding of the site. However, the professionals involved in each new phase of site work have had to be able to trust the work of their predecessors.

Is heritage information available to be used? Today, this is an important question. While it is true that most information generated by the heritage field has never been published, this has not previously been a problem. The resources, rather than the professional studies created to support it, were considered the final public presentation. Heritage sites and programs have been administered by large government bodies that kept files within their own professional units. Reports in site files have simply been retrieved as needed. Anyone interested was generally welcome to a copy.

Over the past ten years, this practice—and the security it provided—has been badly undercut by inadequate funding. Last year, Ms. Carter consulted with provinces and territories on changes in the heritage field over the past ten years. Without exception, they reported a greater number of heritage sites had been identified and placed under some form of legal protection. With few exceptions, they also reported a marked reduction in their capability to ensure that protection of the heritage value of these sites would actually occur. There were gaps in expertise. Many heritage units had no money to maintain either their sites or their records. A large number of heritage resources had become the responsibility of someone else—the private sector, other jurisdictions, or other agencies. Sometimes there were not adequate resources to ensure these new caretakers understood the need for information to secure heritage value during development, or the importance of retaining site records. Today, most professional heritage work is now contracted out to private firms—such as Ms. Carter's.

She said that the heritage community is looking at a much broader future realm of heritage activity. There will be more stakeholders, more custodians, more professionals—"more fingers in the pie." These changes are good because they bring a much broader investment into heritage. However, the tools and practices developed to protect the special value of Canada's special cultural places must continue to be used if those places are to be responsibly protected. She recommended better facilities to register information. How are later professionals working on these sites going to know the information exists?

If a new trust is to be created, the need to safeguard the information related to heritage sites must assume as high a priority as the need to protect the physical integrity of on-site resources. Both are essential to meaningful commemoration of the past. A central clearinghouse for information on heritage sites is becoming essential.

Ms. Carter said that heritage is not just "a sense of place." It is people in a place over time. In Canada, it is the respect for the experience of others in the places one knows that provides one's association to the past, to the future and to one another. Having information is a critical link in this exercise.

John Gordon began by saying that Statistics Canada is not the solution to building a national registry of Canada's built heritage. He then described why Statistics Canada is not well suited for the role.

Mr. Gordon said that, in general, as Statistics Canada collects data from any type of business, there is an attempt to fit the data into a nice Linnean system of boxes known as the standard industrial classification system. As might be expected, companies from the arts and heritage sector do not fit easily into such an "industrial" system. In addition, because of the dominance of the large multinationals in this sector, the sample surveys normally undertaken have a tendency to "bury" any interesting stories that might be developing in smaller Canadian companies—the ones of interest to most Canadian researchers.

He said that this did not stop a group of researchers who decided to develop better and more reliable data on the culture sector. The answer was to carry out census surveys that went beyond the standard industry definitions and collected data from all the players active in a given sector. To cover the costs for such an approach, the Canada Council and the Department of the Secretary of State provided funds to establish the Culture Statistics Program in 1972.

Mr. Gordon said there is currently a program of ongoing surveys in the areas of film, publishing, sound recording, performing arts, radio listening, television viewing, government expenditures on culture, and a survey of heritage institutions.

He said this Heritage Institutions Survey covers a wide range of institutions including the expected museums and historic sites, as well as archives, exhibition centres, planetaria, aquaria, zoos, botanical gardens and nature parks with interpretative programs. He admitted that this was not a good definition of built heritage, but was probably as close as StatsCan would be able to provide.

As a best estimate of how many institutions covered by the survey might be included in an inventory of built heritage, he separated out those respondents that identified themselves as a historic site, either as a primary or secondary function. Mr. Gordon came up with 942 buildings under four categories: historic site, museum, archive and "other." The government owned or operated 444, educational institutions 16, religious institutions 29 and "other" represented 453 places. He admitted this was not much on which to build a discussion of built heritage. He also said that under the *Statistics Act*, he is not allowed to reveal what particular institutions are included.

He said the legislation authorizes StatsCan to collect, compile, analyze, abstract and publish data on commercial, industrial, financial, social, economic and general activities and conditions of Canadians. It gives staff the power to gather whatever data is needed to do the job. To temper this power, however, the Act guarantees confidentiality to those supplying data. Some material is available through the StatsCan publications *The Daily*, *Focus on Culture* and *Canada's Culture, Heritage and Identity*. The Standard Tables also provide data for public consumption.

The good news, said Mr. Gordon, is that there are better ways to build an inventory. If Heritage Canada is successful in its negotiations for tax relief for heritage property owners, then there would be at least a minimum amount information available on the public record for those who register and qualify. This could prove to be a big step forward from a survey-taker's point of view because the tax incentive would encourage registrants.

He explained that StatsCan might be useful then in providing "measures of the activity —economic or other—associated with the identified stock of built heritage. This information could add highlights to an existing portrait.

Mr. Gordon's colleague, Michel Durand, who is Chief of the Research and Communications section of the Culture Statistics Program, has done several reports on the "Health and Vitality of ..." a variety of sectors, regions, cities, etc., wherein he integrates an assortment of collected and calculated measures related to the subject in question. Mr. Gordon suggested that, once Heritage Canada's inventory was in place, perhaps the *Health and Vitality of Canada's Built Heritage* could be undertaken on a cost-recovery basis.

Mr. Gordon then provided personal views about the information deficit on Canada's heritage. He said that while the heritage movement had been extraordinarily successful because it relied on information tools to get its point across, the Internet would change things in the future. People in the movement were very good at identifying the sites, at using literature for validation, at using various devices to recognize historic buildings and in promoting the cause. Indeed, in preservation literature, if one needs to preserve elements of a heritage building from woodwork to stained glass to chimneys, the information is there. But what form is the information in? Right now, most information on the Internet is in text form, but by 2010 graphic form will dominate.

He said that today, there are about two million connections to the Internet, by 2010 there will be 1.5 billion. More than 90% of all communication in the world on the Internet is in the English language. However, 57% of the academic community won't use the Internet because it doesn't think there is anything with much validity. A study he did at the University of Calgary showed 50% of all undergraduates believed they could get an undergraduate degree with *only* reference to digital materials. The study also indicated that 40% of the faculty believed the students could get away with it, even though they disapproved of it. This becomes quite serious if the information is not in the form that the heritage community or the next generation of heritage preservationists want in. They might simply lose interest.

Mr. Gordon was also involved in a study for the Social Sciences and Humanities Research Council of Canada on all-Canadian information and content on the Internet. He said he was surprised that there were only 200 *credible* sites. This doesn't mean high-end academic, but ones that are transparent as to authorship, purpose and message.

Mr. Gordon explained that all Internet traffic is carried by about three corporate interests and all "high-end information" worth selling is owned now by about eight international companies. If one thinks Canadian content matters to these people, it does not. However, the moment there is a dollar to be made, it does. There are some interesting Canadian heritage products that have recently become "commodified" on the Net.

The concern with this new information environment, he said, is that indigenous cultures will become marginalized. For example, he said that if one speaks Tamil and lives in a culture that cannot generate enough money to buy the English product, then the information aggregators will not put it into Tamil because there is no money to be made. That is just an example of the many people involved. Look at the Ukrainian language and dialects of east-central Alberta. Look at the Cree language—the strongest native language in this country—one cannot find an Internet site in Cree.

DISCUSSION/QUESTIONS:

Gordon Nelson: The HCF Governor for Ontario presented several questions. He asked how would Heritage Canada sort out the role it can play from those of other heritage organizations? Many organizations have substantial resources and are already doing a lot of good heritage work. He said that the central task facing Heritage Canada is surely education, but asked if that meant learning or access to information? Some people have said that there is not enough information. Mr. Nelson said his impression from working with local heritage groups was that they were awash in information. The problem was how to get access to it and how to use it.

The second query related to the sense of heritage. There are historians in the audience lamenting the state of the curriculum with respect to history. There have been a lot of comments from panellists about heritage in a more fulsome sense, that is, buildings, architecture, geography and the land. There has been some reference to the desirability of having experience on the land, learning to develop a sense of place. A lot of that is completely gone in Ontario schools. How do we address this in a way that is sensitive to context?

"Education and information smack of rational planning and corporate planning and not of learning. How are we going to get down to the grassroots level and the broad multicultural sense? We talk about communicating in two official languages, but what we've learned today is that culture has many many facets. How do we get at that?"

Finally, he said that Statistics Canada clearly has all sorts of information of a monitoring type. Is it the role of the Heritage Canada Foundation to focus on assessment? On the evaluation of information?

Robert Lemon: He said that when the CIHB inventory was done, a number of communities in the country established their own separate inventory. When Heritage Canada looks towards establishing some sort of national register, how would it reconcile the parallel inventories that currently exist, especially when the criteria change?

Margaret Carter: Responding to the last question, she said that an inventory is simply a list of what is there, and a register would be a list of what is protected that is there. Inventory-level information is simply raw data. It is a broad sweep, whereas what heritage professionals are trying to put onto a register would be those things chosen from the group upon which some value has been bestowed. There has to be some kind of assessment in between.

John Gordon: He offered an alternate method for a national registry model by suggesting the one under the Canadian Cultural Properties Authority. "My greatest fear from my previous life as a civil servant negotiating some discussions on a national register, is the tendency for the people who would control the national register to put very strong limits on what is construed to be protection, and in some cases, that might limit what could be on that register from various parts of Canada. Therefore, I think there has to be some in-depth discussions on the type of model that might be used and best suited for Canada."

Margaret Carter: She added that although the CIHB has dealt with heritage for a long time, it has not focused on analyzing the information collected. She suggested that it was time to start doing so.

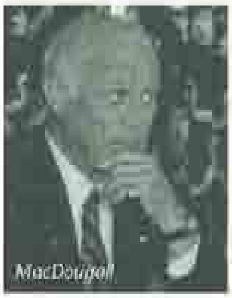
Pat Malicki: She said that many organizations could use information from Heritage Canada, or other groups like it, on the economic statistics on the preservation of built heritage, such as facts about the hours put into restoring the buildings, and the tourism dollars spent there. With the actual economic facts, it would be easier to convince our local and provincial governments that these buildings should be saved, not just for aesthetic reasons, but also for economic reasons.

John Gordon: He suggested that Alberta was a good source for those kinds of statistics and that much information could be gleaned from the Web.

Session 7: Philanthropy

TOPICS: What is the current state of private and corporate philanthropy in the preservation of built heritage in Canada? How can the overall climate be improved, and how can heritage groups develop effective strategies for encouraging private-sector support for conservation? What could the Heritage Canada Foundation do in this field?

PRESENTERS:
Hartland MacDougall, *Founding Chairman, Heritage Canada Foundation*
Sheila Carruthers, *Donations Officer, Canadian Pacific Charitable Foundation*
Linda Cupido, *Vice-Chair, Ontario Trillium Foundation*


MacDougall

Michael Kluckner said on opening the session: "As all of you are aware, when there's any contemplation of something like a National Trust, the question of how it would be funded is first and foremost on a number of people's minds ..."

Hartland MacDougall said that while the Foundation has made progress in the past 27 years, it hasn't been nearly as significant as the original board would have envisaged.

He said the theme—Towards a National Trust—was fascinating because, when the Heritage Canada Foundation came into existence in 1973, it was incorporated as a private foundation with an endowment of $12 million from the federal government. The idea behind it was to create a National Trust, as Canada appeared to be the only country in the western world that did not have one.

Mr. MacDougall quoted from the message written by Heritage Canada's Executive Director, Brian Anthony, in this summer's issue of *Heritage*. Mr. Anthony said that when the HCF was launched, the term "National Trust" was amply employed in the communications that heralded its creation. He indicated that the Foundation lived up to its billing to some extent by "performing some of the functions normally associated with a national trust. However, the toolbox given to Heritage Canada did not contain all the tools normally at the disposal of a national trust, so from the outset there were real, built-in limits to the ability of the nascent organization to fulfil that role."

Mr. MacDougall said that when he took on the founding chairmanship, he was convinced HCF had to be at arm's length from the government. He accepted the role on that basis because he was familiar with all the jurisdictional questions and the governmental issues that existed in this rather confusing country called Canada.

In the early days of the Foundation, Mr. MacDougall said it was fortunate that there were so many outstanding local heritage bodies with which the national organization could work, and with whom it could co-operate, in attempting to develop visibility for what was informally called the National Trust. The involvement with the volunteer groups and their municipalities was to take on projects jointly to restore buildings for lease or resale, and thus try to demonstrate by the results to an apathetic population the benefits of saving our historic past.

He again quoted from Mr. Anthony's *Heritage* message: *But that was then, and this is now. And now, we feel, is the time to have a serious look at the need for a national trust in Canada, the role such a body might play, the tools and other resources it might need, and whether the Heritage Canada Foundation might assume the role envisioned at its birth.*

Mr. MacDougall said he was no longer in possession of the various analyses that were done at the outset of the other existing National Trusts. While they all had similar mandates, the structures and resources varied widely. He recommended that HCF review the Internet information available on several other National Trusts, such as the United Kingdom, United States, Australia and New Zealand, to get ideas for an appropriate model for Canada.

He said that everyone was aware that the loss of Canada's built heritage continues at a disturbing rate. He said that it was necessary to find the ways and means to arrest this while some of our classic buildings from the past generations still exist for the future generations.

Speaking about the early days at the Foundation, he said that members "were naive enough to believe that if we kept the Foundation as a non-governmental body we would be able to raise funds from the private sector, principally from foundations and secondarily from corporations. This proved to be a pipe dream. We were never able to get a campaign for matching funds off the ground." He said that, in fairness, public corporations have to think about all their constituencies, and one of those is the shareholder that is concerned primarily with the company's profitability. To prove that donating to the heritage cause was in their best interest had to be the key.

The success in the early days was all through local volunteer organizations with the support, in most cases, of their municipalities, not necessarily financial, but in a variety of other ways. The financial support is key, and it has to start with governments at *all* levels through taxation policies. Municipalities could be of immeasurable assistance to private giving through concessions in real estate taxes, and in some cases this already exists. However, to do so, they in turn require this to be recognized in a tangible way by their respective provinces. Heretofore, the latter have been facing significant deficits and have been passing part of that load onto the municipalities. Those deficits are now history. However, the game can only really be won if the federal government makes changes in their taxation policies, both in corporate taxes and in income taxes at all levels, as well as in provincial sharing.

Back in 1994, the Canadian Centre for Philanthropy made a submission to the House of Commons Standing Committee on Finance, pointing out that tax credit expenditures plus the federal government's direct support is leveraged almost seven times by the aggregate of voluntary contributions from Canadians. They asked, "Is there any other area of government spending where such a small investment of tax dollars produces such a generous return to Canadian society?"

The year 1997 had a very positive effect, and the latest Budget goes further in recognizing this by reducing capital gains by one-half on donations of ecologically sensitive land. Mr. MacDougall said this begs the question of how about heritage buildings! The federal government has indicated that will be the next step. But how about tax incentives or tax relief for restoration costs?

Mr. MacDougall made it clear that he was not suggesting that governments are the ones to do it, rather that the means to have the private sector do it is essentially in the hands of federal government. With not too much effort and relatively little cost, the government could get the ball rolling and would be astounded by the results.

This Foundation was in its birthing pains when the magnificent Sir William Van Horne House at the corner of Sherbrooke and Stanley streets in Montréal met the wrecker's ball. The municipality claimed with some justification that they could not afford to get involved. One of the greatest streetscapes in North America was beginning to be annihilated. The value of the building site and the taxes on its redevelopment were seen as all-important by both business and the municipal government. Heritage Canada's efforts to involve Canadian Pacific were ignored. Again, Mr. MacDougall suggested that with key revisions to Canadian tax structures this might not have been the case. He said that, fortunately, attitudes since then have changed dramatically. With governments at both provincial and federal levels now into balanced budgets or, better still, surpluses, there is some hope for change, although off-loading by provinces to municipalities dampens that side somewhat.

In the corporate world, profits are up but, regrettably, donations are down. Attitudes are better, but in his opinion, with the exception of Canada Lands and a few others, little has changed from the early days of the Foundation in the 1970s. What heritage groups must do is keep on lobbying both the private sector and governments at all levels.

As for Heritage Canada's future role, Mr. MacDougall recommended that it continue its efforts with the federal government, but also exert more pressure on the provinces to sell the advantages that they can reap from our heritage. Commission a task force or, at least, a study to dig into the successes and failures of other National Trusts in the western world. Donating to charity is part of most corporations' business plans and improved taxation policies at all levels of government should help ensure that Canada's heritage gets its share of the pie. He said that tying in the advantages of retaining the visibility, as well as the history, of our buildings of the past would help the communities of today and of the future.

Cupido

Linda Cupido said that if the media is any indication, few people in the world are as preoccupied with preserving their heritage as Canadians. Subjects as varied as the Internet and the North American Free Trade Agreement all have the same subtext: will these economic and technological forces undermine the ability to preserve Canadian heritage?

"As important as heritage is to most Canadians, as citizens of a relatively young country we are inclined to look forward rather than backward. This makes it all the more important for those of us who care about heritage to make sure that a link is clearly established between our country's past, the present and the future," she said.

Ms. Cupido explained that the Ontario Trillium Foundation (OTF) is Canada's largest foundation in terms of the value of the total grants awarded each year. It now makes grants of nearly $100 million annually to charitable and non-profit organizations in Ontario.

Its mission is to work with others, to make strategic investments, to build healthy, sustainable and caring communities. Founded in 1982, the OTF is funded from provincial lottery money. A year ago, after holding province-wide consultations, the Government of Ontario decided that the best way for Ontario communities to benefit from the growing revenues of the province's gaming initiative would be through the OTF. It authorized a 10-fold increase in its fiscal funding in the year 1999-2000.

The OTF operates as an arm's-length agency of the Ministry of Citizenship, Culture and Recreation. It is a public foundation with an independent board of directors that approves the grants. To ensure that all parts of the province receive their fair share of available funds, the OTF makes community grants available in sixteen catchment areas on a per-capita basis across the province. In each area, grant review teams consisting of local volunteers view the funding applications. These local teams know the needs in their areas and recommend grants to the Trillium Board for its approval.

The Trillium Foundation also makes province-wide grants to organizations operating throughout Ontario or in several parts of the province. Community-wide grants account for about 80% of the total funds allocated annually, province-wide grants for the other 20%. The Trillium Foundation has a professional staff of about 80, a volunteer board of directors (including Ms. Cupido) of 22 and more than 320 volunteers sitting on grant review teams.

Before the budget was increased last year, the OTF primarily made grants to social and human service organizations. When funding was increased to $100 million dollars, it began to provide support in other sectors, including arts and culture, sports and recreation, and the environment. Targets were set rather than absolute amounts to allocate to each sector. The funding target for arts and culture is 10% to 20%. In all sectors, the OTF will make project, operating and capital grants. They can be for a few months or several years, and they can range from less than $1,000 to more than $100,000. Collaborative initiatives are encouraged. As this overview suggests, the OTF's scope is quite broad and, given the funds available, can make a significant contribution.

Ms. Cupido then described the part the Trillium Foundation can play in preserving heritage in Ontario. In the fiscal year 1999-2000, the OTF made grants totalling $80.5 million. Of these, more than $14 million were directed to arts and culture, or 18% of the total grants. At least a tenth of this financial contribution supported heritage initiatives.

While most of the grants are for $50,000 or less, many of its heritage grants to help restore heritage buildings are for larger amounts. For example, it approved a grant for $75,000 to help restore a theatre in Chatham, Ont. A similar amount was granted to the North American Black Historical Museum to help restore a church that was a stop on the Underground Railroad. The OTF has provided grants to many other organizations wishing to restore buildings that represent a significant part of their community's past, including railroad stations, schoolhouses and a grist mill.

However, grants in support of heritage are by no means all for bricks and mortar. The OTF has also provided $33,000 to the Muskoka Lakes Museum to create an interactive exhibit on the historical development of the lakes; $10,200 to the Mackenzie Heritage Printery Museum, Canada's only working printing museum, to catalogue more than 4,000 historical articles; and $122,500 over more than three years to support a collaborative effort to market the Billy Bishop Museum.

Ms. Cupido said that community-based organizations have a very important role to play in making heritage come alive. These organizations, almost entirely run by volunteers, have the knowledge, the determination and the commitment. What they lack is funding. Although the Trillium Foundation has only one full year in funding heritage initiatives under its expanded mandate, there is real value in the work being carried out by the volunteer grant review teams. They are helping to ensure that Trillium funds reach small-based community organizations and remote communities. While this funding is beginning to make a difference, it is still important to have broad-based private and public support for heritage preservation and promotion.

As the Trillium Foundation moves into its second year of funding at the higher level, Ms. Cupido said it is committed to work co-operatively with other foundations and to learn how its financial contributions can best support each sector.


Carruthers

Sheila Carruthers spoke about the Canadian Pacific Charitable Foundation which represents the CP group of companies' wholly owned subsidiaries and is funded by CP Limited. It is a large, diverse company involved with ships, hotels and the railway.

She said that the CP Charitable Foundation funds similar areas to the Ontario Trillium Foundation: education, creativity and innovation which are predominantly in culture and arts, social services, environment, youth, town and communities, and health and hospitals. Its percentages are again very similar to Trillium's.

Ms. Carruthers said the Foundation responds to the need in Canadian communities, particularly those which were affected by the sale of Canadian Pacific's short-line railways across Canada. There has been some controversy both ways about that, with some asking, "how can you possibly cut our line out?" and others not wanting the railway there anyway. The challenge was how to fund these many smaller railway stations that were becoming deserted, and other buildings that truly do deserve preservation.

Ms. Carruthers said that, after a lot of soul searching, it was decided the best way was to develop a proactive program—one where the criteria set could fit with the corporate mandate, showing CP as a forward-thinking, progressive company despite being 100 years old, and at the same time preserve Canadian heritage for all to enjoy. The result was this program. She said that by redirecting $2 million out of the $8 million budget, it set a target of developing projects that reflect Canadian heritage as well as contribute to Canadian communities.

This new focus was community-capacity building or what she called a back-to-the-future emphasis. The Foundation looks for projects which are re-invigorating the community, so that this is not just preservation for the sake of preserving, and not yet another small museum for the sake of putting a few items on show, although museums have been funded. So far, funds have been awarded to 21 projects.

The Foundation's vision for the future was that the projects must be sustainable within the community where it exists. There is no way this funding will be there forever. The project must have relevance to the past and to the future of that specific community, and have the active support of the community.

She gave the Virden, Manitoba, community arts centre as an example of a funded project. It is an art gallery, art store, art workstation, art classroom and a community centre set in an old railway station. The Foundation is delighted with it and the community's involvement in working together.

Ms. Carruthers said the CP Charitable Foundation will fund up to one-third of the project with a ceiling of $100,000, with the expectation that another third will be raised within the community and one-third will be raised elsewhere, such as from local or provincial or federal government grants. She thought this is why it is such a success story because it is not just a handout, but a hand-up.

She spoke to the comment made by Mr. MacDougall about CP not helping save Van Horne's house. She said that 1973 was way before her time. However, there was another huge challenge in Montréal in 1996 with Mount Stephen House. It has deep relevance to Canadian Pacific, but how can CP support it when it does not own the building? Back then, she said, CP was utilizing the building, but it also had many other buildings, such as Windsor Station, that were in desperate need of repair. The Foundation was asked to fund a coffee-table book as a fund-raiser for the Mount Stephen House, but turned it down. She said the Foundation has to say no about 80% of the time. This situation resulted in a re-think about how to better direct CP funding.

As a corporate funder, endowments are very challenging for CP to give to. Once funding has been effected, forever and a day that fund continues, but the funder frankly loses control and yet the CP name is still on it. She said she receives letters from endowments and scholarships that were set up 50 years ago that are still going on, but they might be targeted now in a way that is completely detrimental to what the CP corporate directive is. This is a challenging problem, she said. The Foundation must be cautious on that side. It prefers not to favour endowments, but rather to favour direct funding for specific programming on a one-time basis that generates support for a community need that fits in with its corporate mandate.

On the corporate side, she said, the Foundation must look at the relevancy of a project. It cannot just be a name on a building or the fact that this organization happens to be there. There has to be more to it than that. So a little bit of creativity, relationship building and discussion are required, because everybody wants to support the common good. It is just finding out exactly how the Foundation can do it and no two communities are the same.

The Foundation has effected $1 million, but there is still another million dollars. She suggested to the conference participants that they consider this program. The criteria and other information are available on CP's Web site. The deadline is January 31, 2001, and all applications received by then will be seriously considered. Incidentally, the first contribution was made in 1883 when William Van Horne donated $2,000 for the creation of the Winnipeg General Hospital, and his example is still being followed.

DISCUSSION/QUESTIONS:

Ian Schofield expressed his concern over Canadian heritage being bombarded by globalization. He said that with Canadian Pacific, which has such a strong and long history in Canada, now partnering with American and international companies, how will this affect the CP Charitable Foundation and what is funded?

Sheila Carruthers: In response, she said that it would affect Canadians very little, because the Foundation is a Canadian one established to fund Canadian projects in Canada. However, she admitted that globalization presented a huge challenge in how to support local communities wherever CP business may be. Canadian Pacific is very proud of being Canadian and has always said that the most important thing is to be regarded as Canadian because that adds a lot of strength to its corporate message.

Concerning support, she said that if one looks at the Imagine Campaign formula of contributing 1% of pre-tax profits, that is a very efficient philosophy. The top 450 companies in Canada who do abide by this are all trying to give more than 1%. It doesn't matter which country one might be in, if one is making profits or working and having an impact in that community, one should be concerned about that community. However, she said that CP could bring a Canadian message with that as well. It can bring along Canadian ethics and standards, and this is what it is trying to do.

Hartland MacDougall: Referring to his comment that corporate profits were up, but that donations were down, he explained that going global was only part of the reason. The other reason was the issue of mergers. He said that when two companies get together, one plus one no longer equals two, but only one and a half. There are such very generous American companies, but when they take over Canadian companies that donations budget becomes considerably, and in some cases dramatically, smaller.

Sheila Carruthers: She said all CP can do is set an example. Although CP is corporately a member of a few American associations that do promote the reasoning that one should support communities wherever they are, it is very difficult when the head office is in another country. She added that recently several American-based petroleum companies closed their community relations departments here in Canada.

Pat Malicki: She said she lived in a city where, within the last 10 years, two major corporations have been taken over by Europeans. She has seen the jobs leaving as well as the donation dollars that have been very important to that community, and asked what citizens could do?

Sheila Carruthers: She suggested writing to the most senior person of that company here in one's community and to the head office. If one explains in an intelligent manner what has been seen in the community, then they should react to it.

Louise Crane: She expressed concern with the funders themselves who are not willing to be the first to get on the bandwagon. Every foundation funder asks for creative partnerships within the community, but they are not prepared to say, "we will provide the seed money." She said the small community organizations in Alberta are struggling to formulate a project, and that they are at a loss as to where to get those first dollars to be matched by other funders.

She said that another issue that constantly comes up is the cost of preparing the proposals that are asked for by the foundations, and asked if anybody ever heard of where they build in the costs of proposal preparation or payback of these costs.

Hartland MacDougall: In responding, Mr. MacDougall said he had been involved in a lot of fund raising and never found a solution to providing the initial dollar other than with the organization or with its supporters or the community. There are lots of people that are ready to match, but they want to see the organizers or the community behind it as it starts out.

Sheila Carruthers: She said the CP Charitable Foundation now has an application form so that people don't waste their time on proposals. The questions asked are the trigger points for exactly what the Foundation is looking for and the Trillium Foundation does this as well. This helps ensure that the most relevant and the most deserving programs are funded.

Adriana Davis: The Executive Director of the Alberta Heritage Community Foundation said there has been a major interest in the charitable sector in building effectiveness and efficiency. She explained that, about eighteen months ago, a provincial charitable advisory committee was set up to create a blueprint for that sector in Alberta. She said she will chair the roundtable looking at finances, accountability, partnerships and building capacity. Having just been appointed to the federal roundtable on building capacity, Ms. Davis suggested that the heritage community needs to be represented at these larger discussions around these issues, and would accept any information or observations from heritage members.

Karen Mudie: Speaking to Ms. Carruthers' comments about how CP favours providing money to specific projects as opposed to a foundation or trust, she asked whether that is indicative of other corporate donors. She also asked how this aspect of funding could be reconciled in a proposed National Trust.

Sheila Carruthers: She answered by saying that this trend is even happening within the government. There are organizations citing that they can't even get general operating funding. She said it is the emphasis these days and it falls back to that endowment issue. She suggested that if there was a major capital campaign that was challenging companies and private and public funders to come to the table, it would be in difficulty as the trend these days is away from major capital campaigns.

Session 8: Granting

TOPICS: Public granting programs have been essential to the stewardship of the built heritage of Canada. What are the current patterns in heritage project funding at different levels of government? Are the needs being met? How can the situation be improved? Is there a role for Heritage Canada?

PRESENTERS: *Steve Barber, Heritage Planner, City of Victoria*
Mark Rasmussen, *Director, Planning, Cultural Facilities and Foundation Services, Alberta Community Development*
Odile Roy, *Councillor and President of the Commission on Town Planning and Conservation, Québec City*


Barber

Steve Barber spoke about the successful grant programs in the City of Victoria, including the most recent property tax incentives program. Victoria has a history of providing and administering grant programs that date back to the late 1970s. These grant programs are fundamental and critical to the success of the city's heritage programs. He said that the heritage community all across Canada has very considerable needs for similar types of programs. There could be a role for a very strategically directed grant program for a National Trust that could have quite an impact on heritage programs in Canada.

The City of Victoria operates its grants program through two agencies: the Victoria Heritage Foundation and Victoria Civic Heritage Trust. These are both arm's-length organizations. The City originally went to them because provincial legislation prohibited giving direct financial assistance to private property owners. Although this was changed with amendments in 1994 to the provincial heritage legislation, the system in place was already working quite well.

The Victoria Heritage Foundation (VHF) is an independent foundation established by the City of Victoria in 1983 to administer a program of house grants. Over the last 17 years, it has provided 465 grants to 190 different houses. Initially, the program provided up to 50% of eligible costs for the restoration of a heritage-designated house. There has been so much demand, though, that every year the Foundation has approximately 35 to 40 applications and has had to reduce the amount of money available to each so as to spread the funds to more applicants. The result is that now it gives out about 25% of eligible costs. The maximum one can receive under this program is up to $7,500 per property per year, but the majority of grants are actually much lower than that.

The VHF had a fixed budget until last year when it received more funding from the City of Victoria, up from $85,000 to $105,000 a year. People often despair, saying they can't support that kind of program in their city, but with the right kind of lobbying and the right kind of success stories, it is possible.

One example of the superb restoration work that the VHF assisted with is an 1883 Italianate-style house that was relieved of its rather undistinguished modernity. Other grant projects included the repainting of an 1892 Queen Anne-style house to its former original colours; the reproduction of wooden balustrades for a porch in an 1896 Italianate-style house and an 1891 Queen Anne-style house; and the restoration of a plain-looking 1907 house covered in asbestos shingles back into a handsome Queen Anne-style house.

The other role that the VHF has is education. It found that it was prudent to provide homeowners with an understanding of the techniques of rehabilitation and restoration. Therefore, the VHF conducts homeowners' workshops where experts demonstrate techniques such as the proper way of stripping paint from historic woodwork.

The other important arm of the City of Victoria's heritage program is the Victoria Civic Heritage Trust. This partnership has been fundamental to the success of the City's program. The Trust was established in 1989 as an independent, registered non-profit society to assist the city with the administration of its rehabilitation programs. Every year it receives additional money because it is able to demonstrate some very successful programs. The most important one is the Building Incentive Program which, until recently, provided grants up to $50,000 per building on a cost-shared basis with the owners of commercial and institutional heritage buildings. Initially, it was limited to the downtown area, but it has become so successful that it has been expanded across the city. The demand for funds has been so great that recently the funds were reduced to a maximum amount of $25,000 per project.

Examples of the quality of this work include a rehabilitation of two late-1800s buildings on Yates Street in Victoria's old town by the Victoria International Youth Hostel that has won many awards for the quality of the restoration. Another project was the Weiler Building, an 1899 department store, which received a $50,000 grant for a $230,000 rehabilitation project that preserved all its original wood windows. The Board of Trade Building in Bastion Square, built in 1892, was suffering from some badly deteriorating masonry on the upper façade. This eventually led to a project of $500,000 from its Edmonton-based owners, assisted by a $50,000 grant from the Trust. The masonry was repaired and all the wood windows were rehabilitated.

The Victoria Civic Heritage Trust was also instrumental in securing a $300,000 grant for the City of Victoria from a provincial program, the Heritage Area Revitalization Program, of the B.C. Heritage Trust. Unfortunately, this program has been discontinued due to budget cuts. However, it was a good example of how a strategically placed program concentrating on a specific area within the city can be quite effective. In Victoria's case, it targeted a two-block area in the downtown core that had developed quite a negative reputation as a centre for crime and prostitution. One of Victoria's early fire halls, the building at 636 Yates Street, was handsomely restored with a $50,000 grant from this provincial Heritage Area Revitalization Program.

The City of Victoria charted a comparison between the amount of the grant and the amount of private investment that has been generated, as well as the payback period to the municipality. In other words, how many years following this grant does it take for that money to actually be paid back to the City through property tax increases? In some cases, the payback period is as short as two or three years. This program not only assists heritage buildings, but also works from a financial point of view for the City. A new program that has been running for just two years provides property tax exemptions. It is tied to a policy promoting residential life in the downtown core. It is for downtown heritage-designated building owners who are willing to convert vacant or under-utilized upper floor spaces into residential use. It is based on the cost of seismic upgrading to convert those upper stories. The existing property taxes can be exempted for up to ten years.

Mr. Barber said that there had been some successful conversion projects back in the 1980s in the city, but then projects ground to a halt. To find out why, a study was commissioned to look at some typical buildings such as the New England Hotel. After considering the basic condition of the building, schematic drawings for its rehabilitation were prepared and costed out. It was discovered that, because of the cost of seismic upgrading, it was not economically viable to do a residential conversion. The reason for this is every five years the National Building Code is changed, and recently the experts have discovered that British Columbia is in an earthquake zone. Therefore, any structure that is built or rehabilitated has suddenly had to cope with a huge increase in the seismic resistance requirements. This is a major cost factor. Another study then detailed how the City could create a program of tax incentives to address these high costs. The program has been very successful in what the media described as "helping transform derelict dumps into trendy townhomes."

The first project was in Chinatown where the tenement buildings had been sitting empty for 20 years and were seriously deteriorating. Bought by an architect, the external brick walls were preserved and 12 new live-work townhouses were inserted. He also opened up a centre alleyway that evokes the heritage character of Chinatown District. The project also involved the rehabilitation of the 1891 Hart Block into architect offices on the second floor and new retail stores on the ground level. The project received $50,000 for each of the two buildings and a 10-year tax exemption, and resulted in private investment of $1,256,000.

Across the street, another project involves the $2-million conversion of a fire-damaged 1909 cold-storage warehouse into 31 rental apartments. Again, it was assisted by a $50,000 grant from the Building Incentive Program and a 10-year tax exemption. It too has won many awards.

Mr. Barber then spoke of the negative impact these powerful incentives can also have. An example of this is the Kinemacolour Theatre, one of the few remaining historic theatre buildings with much of its original ornamentation and wall plaster detailing still intact. It was acquired by a private developer who successfully lobbied city council for permission to install large new openings on the exterior façade to facilitate the conversion to residential units on the upper floors. City heritage planners recommended against this, but the city council was so interested in having residential units in the downtown that they approved it. Therefore, the historic interior was completely gutted.

Despite this, city council appears enamoured with the success of this program. It has created 70 new residential units in the space of two years and generated more than $7 million in private investment and six heritage buildings have been rehabilitated. The increase in property assessments resulting from these projects over the long term will positively affect the City's revenues.

At the provincial level, the funding provided to the B.C. Heritage Trust over the last ten years has declined from $2.2 million to $750,000. On one hand, there has been a huge decline in the funding available for grants at the provincial level, and yet these successful programs could be models for an expanded program of financial assistance in some form all across Canada.

Mark Rasmussen presented the current trends in provincial grants for heritage conservation in Canada. He said that "while heritage building owners are coming more and more to appreciate the multitude of benefits that arise from keeping and restoring their properties, there is nothing like specialized heritage grants and sheer economics to help focus their attention and provoke preservation action."

Provision of grants "puts it on the line," proving the government and the public have a tangible commitment towards seeing a building preserved. For the building owner, it shows external commitment, but more importantly helps to make it possible to do restoration work that might not otherwise happen, or at least might not happen with the same quality. For the government agencies involved, it provides not only a stimulus for immediate preservation, but also some level of control with a limited investment.

In Alberta, for each grant dollar in a restoration project, typically between three and five dollars is coming from the property owner or other sources. Therefore, for governments, grants are a far cheaper method of preservation than acquisition, and they encourage broad-based involvement. It is not only effective preservation, but also in many cases low-cost urban revitalization and tourism development.

Although some heritage grants do come from municipalities and the federal government, the primary public granting bodies across Canada are provincial. Yet, said Mr. Rasmussen, two major limitations exist with this method.

First, there is never enough money available within government budgets to service the huge and growing demand. There are thousands of buildings out there that need costly restoration work. Furthermore, after more than a decade of "fiscal restraint" within governments across Canada, the trend has been for grant budgets to decline and, in some cases, disappear entirely.

A recent survey of 1,000 randomly selected Albertans showed that 93% indicated that heritage resources are important to them. So at a time when public appreciation for heritage conservation seems stronger than ever, the funding to support it has gone down.

In Alberta, over-subscription for provincial heritage grants has reached approximately 40%, even though the grant budget remained intact through the recession. The failure to meet the potential in heritage conservation because of grant budget shortages is a very serious problem.

However, just as serious are the skewed economics of urban development. Even if one had good grant budgets, there is simply not enough money available to offset the potential economic losses in the urban core where a building is grossly under the property's carrying capacity. What difference does a $100,000 grant make if a developer stands to lose several million dollars by not building his high-rise? Mr. Rasmussen said that luckily, in recent years, many of the other economic aspects of historic building retention have changed, and for the better. An entire specialized industry of restoration has been established, with restoration architects and technicians and material suppliers that were not available in this country twenty years ago. There is also a tremendous track record in restoration now to draw on. The consequence of this is that cost estimates are much better than they used to be, with fewer surprises, and often those costs have gone down.

There is also a track record for return on investment, showing both consumers and tourists like the special character of heritage structures and will often go out of their way to visit them. This speaks to both the prestige value and attractive nature of these resources. A significant trend is the growing number of instances where restoration can now go on without special grants because of the other benefits and advantages of heritage structures.

In the long run, it is hoped that these "other" economics will overtake most of the need for government financial incentives in heritage building preservation. Yet, in the medium run, one of the best prospects for encouraging large-scale preservation may be tax incentives for heritage building redevelopment. These tax incentives could help overcome the limitations of grant programs discussed earlier, and if the U.S. experience over the last 25 years is any guide, it could have a dramatic effect on Canada's cultural landscape.

Many preservationists have been encouraging tax incentives here since the late 1970s, yet only lately has there been recognition of the merit of this, and it is largely because there would be a huge deferral of tax revenues by the federal government. The U.S. General Accounting Office, not renowned for its sympathy to cultural investment, once called the tax incentives for heritage buildings one of the "best anti-recession, pro-investment" techniques available to any government. Ottawa lawyer Marc Denhez has done incredible amounts of work in the tax incentives area and is a good contact for further information.

Another medium-range technique that needs to be explored far better in Canada is covenanting, as discussed in the pre-conference workshop. This would allow for the preservation of a whole building or key architectural elements through legal caveats by purchases, swaps or recognition of social responsibility.

However, for now, most provinces depend upon at least small grants to encourage selected conservation projects. As for the Alberta government, it has always striven to have heritage grants make a difference. It tries to be one of the first partners "in" on good projects to add credibility to encourage other contributors. At one time, the grants often made the difference between buildings left standing and those destroyed. However, today provincial grants tend to make the difference between expedient renovation and proper restoration work. Mr. Rasmussen said that Alberta money comes with strings attached—the restoration work must be done to certain standards, and is normally tied to the heritage designation process where buildings are legally protected, as are such investments in them.

Although it was a daunting task, Mr. Rasmussen undertook a comparison of provincial heritage grant programs across Canada. The varying definitions of what is included from jurisdiction to jurisdiction and the range of funding entities involved made it difficult. However, by excluding operating grants for major museums and provincially owned developments, and focussing more on support specifically devoted to community heritage initiatives in building conservation, heritage awareness, and local museum programs, the picture became clearer.

Only the provinces of Quebec, Alberta, and now Ontario, provide multi-million dollar support for community heritage initiatives. According to their latest annual reports, Quebec provided some $5.5 million for 144 local heritage projects, primarily through municipalities; even more impressive than that, though, is the $14 million annual support for community museums, by far the strongest in the country.

The Alberta Historical Resources Foundation provides $3.35 million annually for heritage site/building preservation, including a little more than $1 million for building grant programs, around $600,000 for a Main Street Program, and about $1.2 million for community museums. In Ontario recently, support for community heritage initiatives has dropped dramatically, and the Ontario Heritage Foundation has focussed in large part on property acquisition and conservation easements, with a growing emphasis on natural features. However, last spring, the $10-million Heritage Challenge Fund was announced to "preserve and enhance heritage in communities in Ontario."

While these matching grants will do much for architectural preservation there, they are spread over a three-year period. With such a large population and building base to service, renewal of the Heritage Challenge Fund is not assured. Still, it is a start, he said. In review, cultural support to Quebec has always been paramount, Alberta has managed to successfully put an economic face on what they do and Ontario's new program is billed as a means to strengthen its communities.

The provinces of Manitoba, Nova Scotia and British Columbia all provide grant assistance for heritage around the million-dollar level annually. In Manitoba, some $1.3 million was provided to a variety of heritage projects last year. This included $600,000 for 106 projects through the Heritage Grants Advisory Council, $300,000 for the Designated Heritage Building Grants Program, $255,000 for the Community Museum Operating Grants Program, and $429,000 for the Special Theme Museums Program. Nova Scotia's community museums receive some $900,000 of $1.2 million in annual heritage grants, with the rest going primarily toward building conservation projects. British Columbia devotes about $850,000 annually to heritage grants; slightly over half of that goes to site/building conservation. This is a substantial reduction from where the B.C. Heritage Trust once was.

Basic heritage grants support is also provided in Saskatchewan, Newfoundland and the Northwest Territories. The Saskatchewan Heritage Foundation is providing approximately $400,000 annually, with the vast majority going to heritage building projects. Recently, it has also invested in the stabilization work on the Clay Bank Brick Plant, which is a national historic site owned by the Foundation. Newfoundland distributed some $182,000 in 1998-99 for provincial heritage grants: $100,000 for Registered Heritage Structure Grants through its foundation and $82,000 in other heritage grants through its Ministry of Tourism, Culture and Recreation. The Northwest Territories last year gave out $126,000 in core funding for the Registered Heritage Centres, and $50,000 for their geographical names. The brief research did not find anything in the annual reports indicating that New Brunswick, Prince Edward Island and the Yukon have any formal community heritage grant programs in place at this time.

While this is a very non-scientific summary, and some other funding vehicles no doubt exist, it does provide a feel for the $30 million in annual financial assistance for community heritage projects being offered by provincial and territorial governments. Although it sounds like a lot of money, nearly two-thirds of that falls to Quebec alone, and well over half of that support goes to community museums. Considering the billions of dollars' worth of heritage building inventory that exists in Canada, public sector investment in such conservation is very small, but it is also a very important element in preserving some key showcase buildings.

Mr. Rasmussen asked why there is such a spread from province to province in this kind of assistance. He also suggested an answer. "Perhaps as important as the size of the potential funding pools is that some jurisdictions have been more successful than others in making the business case for their investment."

In the end, it is critical that every jurisdiction successfully associates community heritage initiatives with the provincial government's core cultural values, as is the case in Quebec, and key economic development goals, such as in Alberta and Ontario. Performance measures can help do that. Conversely, agencies in retreat that devote themselves exclusively to reacting rather than planning may see further slippage in provincial heritage support areas.

He concluded that three steps appear necessary to better the prospects for community heritage projects. First, in the short term, all jurisdictions must immediately become better at making the case for provincial investments in heritage. Secondly, in the medium term, promoting tax incentives for heritage buildings and perhaps covenanting or alternative solutions for encouraging preservation are needed. Thirdly, in the long term, it is important to better research, encourage and articulate the "other" benefits of building conservation. These include the "attractive" nature of the product, improving the economics of building recycling, environmental sensitivity, the educational and social benefits of heritage, and the general benefits towards quality of life.


Roy

Odile Roy shared her experience in Québec City and presented four heritage concepts: grants in the historic district of Old Québec, in the nearby old districts, a specific example of a revitalization program for artist studios and some ideas for the future.

In 2008, the City of Québec will celebrate its 400th anniversary, which makes it one of the oldest permanent European establishments north of Mexico. Four hundred years of history have left traces across all of its architecture and urban landscape. It is recognized throughout the world as a rich heritage site, one that must be preserved.

The value of the historic building ensemble that makes up Old Québec has been twice recognized. First, by the Government of Quebec in 1963, when it obtained the status of a historical district by virtue of the *Loi des monuments historiques* established that same year. This law, replaced in 1985 by the *Loi sur les biens culturels*, allowed for the designation of municipalities or parts of municipalities where there is a collection of buildings of historic interest.

The second recognition came from the designation of Old Québec in 1985 as a UNESCO World Heritage Site. This interest in Québec is due to its being completely surrounded by a fortified wall, a unique phenomenon in North America, and because it represents the cradle of French civilization on our continent.

The recognition of the urban and architectural heritage of Old Québec is certainly an honour, but it also imparts an important responsibility which its citizens, municipal administrators and different levels of government must share. For the municipality, which is the guardian of this heritage, this responsibility means it must attempt to define, disseminate and share a coherent worldview of the historic city and its evolution. It also must look at the quality of physical interventions transforming the city and its buildings, while ensuring a balance between heritage and private interests.

The City of Québec uses two main tools to ensure the quality of changes in Old Québec. The Planning and Preservation Commission, begun in 1928, is mandated to control the architectural appearance and homogeneity of new construction. This commission is required to revise and approve, or refuse, any type of construction project, renovation or demolition in the city. Within the limits of its mandate, these decisions are final and cannot be altered, either by the municipal administration or city council. The second tool is a financial aid program made possible by an agreement with the provincial Ministry of Culture and Communications.

Ms. Roy explained that, in order to financially assist property owners carrying out building renovations in the historic district, the city participates in three grant programs in partnership with the province. The first is a grant program for the restoration, renovation, new construction and recycling of non-residential structures into residential buildings within the historic district.

The second grant program is the main one. It assists in the restoration of traditional buildings within Old Québec. This program helps property owners restore certain historical elements on buildings. Eligible work includes those elements affecting the exterior of buildings (such as the stonework, masonry and outside cladding), commercial façades and stone walls. Grants are awarded for up to 40% of the eligible costs.

The third program is intended to promote fire protection. Grants are provided for the installation of fire and smoke detection systems within buildings in the historic district.

Thanks to these programs, whose costs the City of Québec and the provincial government share equally, almost $2 million per year has been awarded to support these projects in the last few years. However, this amount is still not enough to meet the demand. She said that year after year the waiting list gets longer for those wanting some long-term funding for their restoration projects.

These tools for financial aid are very important. Combined, they rigorously control the quality of restorations, the materials used and the professional skills required to ensure the authenticity and the character of the historic buildings in Old Québec.

Unfortunately, the legal designation of a historic district sometimes has the effect of abandoning the surrounding areas. Therefore, it is important to show what efforts have been made for the preservation of the heritage, generally more recent but too often more neglected, in these forgotten quarters. In Québec, the historic district has the greatest concentration of buildings from the 18th and 19th centuries, but the surrounding quarters, "les faubourgs," also possess a rich history.

Saint-Roch is the first faubourg of Québec, situated at the bottom of the cliff. This is where the artisans and craftsman who were dislodged by the construction of the fortifications to the west of the old city in 1745 relocated. This is also where the workers in the wood industry and in the shipyards along the Saint-Charles River at the start of the 19th century were installed. This section later became the true centre for economic and commercial activity for the whole city and remained so until the middle of the 20th century. Then came construction of the suburbs and commercial complexes. In the 1960s, the main business street in Saint-Roch was completely cemented over and covered with a roof to make a mall, but now it is being removed.

In the Saint-Jean Baptiste faubourg, at the start of the 18th century, urban expansion to the west of the Upper Town caused the religious communities and estate owners to subdivide their properties into residential lots. In Lower Town, the Saint-Sauveur faubourg developed principally after the great fires during the middle of the 19th century. Finally, the Montcalm and Vieux-Limoilou faubourgs were developed at the start of the 20th century according to an orthogonal road network and a housing development plan previously unknown in Québec.

Each faubourg or old quarter, by the characteristics of its buildings, contributes to the particular culture of the city by showing the different styles of houses and habitation. For these quarters, as for the Old Québec historic district, the first tool for protection of this heritage consists of the Planning and Conservation Commission, whose control is more subtle and less rigourous than that exercised by the financial incentives program.

One of the most original means used to support the vitality and to preserve the heritage in the old quarters was the establishment of the revitalization aid program. It meets the demands of both property owners and developers while revitalizing and preserving the quality of the old quarters peripheral to the historic district. The City of Québec and the provincial government in 1996, under the auspices of the Habitat Society, jointly set up this program. It supports mixed and varied redevelopment to encourage people to live, do business and invest in the area. The program costs are divided equally between the two partners, but it is managed by the city. It offers direct grants and basic tax credits in eight categories:

- renovation and restoration of private residences
- renovation and restoration of residences for non-profit housing organizations
- renovation and restoration of artists' studios
- new construction and re-use
- opening up of courtyards
- renovation of commercial façades
- stabilization of structurally unsound buildings
- access to properties.

In 1998, almost $8.5 million was awarded in these different categories, and the money was spent throughout the entire city. In 1999, more than $3.5 million was given out in grants. As far as tax credits are concerned, these are used to help property owners meet their taxes that have increased as the improvements resulted in increased property values.

Although the main objective of this program is not heritage preservation but urban revitalization, some areas do try to preserve the architectural qualities while restoring the traditional aspects of these buildings. When revitalization touches a heritage building, it allows for the preservation of its special characteristics. Consequently, the program has encouraged the quality of preservation of built heritage in the surrounding quarters of Old Québec.

As an example, the program assists in the recycling of a large number of warehouses and industrial buildings in the Saint-Roch quarter into artists' workshops. Started in 1997, the program was designed to help with the redevelopment of the Saint-Roch quarter. The artists were already using the old factories and abandoned warehouses because it was cheap to live and work there. The City of Québec did not want to lose them in the renewal efforts, so it provided financial assistance to encourage professional artists to stay permanently in the area. This means that, in Saint-Roch, there are now such institutes as Laval's School of Visual Arts, the Centre of Development of Information Technologies and an artists' collective called Méduse, alongside the economic and urban development centre.

One million dollars were given to the artists in 1998 to allow them to become owners of their studios. These grants were given within the framework of the revitalization program and were worth up to 30% of the purchase price and 40% of the eligible renovation costs. The artists were also given basic tax credits. The program specifically targeted the artists themselves and the investment brings stability, safety, and security and gives them a creative space adapted to their needs.

During 1997-98, ten projects were carried out in Saint-Roch, creating 101 artists' studios including 81 new ones. This was a real success both architecturally and economically. The materials used by the architects in the recycling of the buildings, such as galvanized steel and cement, inspired architects to try new techniques and gave rise to a new architectural expression in the quarter.

From a social and economic viewpoint, the program enabled the direct investment of $5 million and the impact on the vitality of the area was considerable. These projects have encouraged investors to become interested in this area and become involved with the recycling of other buildings. In 2000, an important project in re-adapting and enlarging an old garage will allow the addition of 33 new studios, of which visual arts students occupy six. The projects that were helped by this program have given Saint-Roch one of the greatest concentrations of in-studio artists in North America. This, of course, creates a very dynamic and attractive element in Québec. Many other municipalities have been inspired by these efforts of highlighting the redevelopment of a specific area while respecting its sociological characteristics, rather than basing it on models imported from another culture.

Ms. Roy agreed with her two colleagues in the session in that there simply is not enough money. If heritage is a public affair, then the public must take up their responsibility. Before enlarging the idea of heritage as has been done over the past 25 years, it is necessary for the heritage movement to ensure it can continue to support the built heritage in the same way.

Although, she said, financial incentives and tax credits have helped, these measures must not contradict other tax measures. For example, the entire financial situation should be re-evaluated as the city now favours those who let their buildings get run down. When a property deteriorates, the tax rate goes down, and then the owner can ask for grants. However, someone who constantly maintains a home gets a huge tax bill and therefore is penalized. If there is a major restoration, right away the city runs up against this problem. An increase in value means an increase in taxes.

Both heritage and culture are very important economically. By adopting some of the language used to justify economic reasons, the argument for built heritage could be expanded. In Québec, in 1996, a study on the effect of cultural activities showed that it wasn't necessary to take an investment loss, but rather that investment had a very positive economic impact. As it was for culture, the results for heritage could be very surprising. Certainly, an investment in heritage is a valid one.

DISCUSSION/QUESTIONS

Jim Bezanson: In recapping, Steve Barber discussed the question of effectiveness of grants if funding is becoming limited. Perhaps using more discretion in choosing projects would maximize the authenticity achieved and therefore the recognition by people on the street. Mark Rasmussen emphasized that grants are cheaper than acquisitions and that control can be achieved by giving a grant. He also said that people will much more quickly apply to a preservation or heritage review board for a grant than they will for a permit, and it reduces the cost of litigation and of building inspectors' time, while generating employment. Odile Roy said it is important to focus more on the economic benefits of heritage preservation in a language that the lay person can understand.

Notes from the Speaker, Minister's Luncheon, September 15

SPEAKER: *The Honourable Senator* **Daniel Philip Hays**

Hays

Senator Hays: Welcome to my hometown. I'm very pleased to join you, on behalf of the Minister of Canadian Heritage, Sheila Copps.

The Minister is a strong proponent of all aspects of Canada's heritage, including our built heritage, and welcomes opportunities like this year's Heritage Canada Foundation conference to address a question that concerns every Canadian —the question of a National Trust for Canada.

The idea of establishing a National Trust in Canada is not new. The idea, if not the form, of a National Trust was present at the creation of Heritage Canada in 1973. By encouraging Canadians to identify, protect and enhance their cultural, built and natural environments, the Heritage Canada Foundation has helped set the stage for the development of the next act —the creation of a National Trust—to expand heritage protection in Canada.

Specifically, you helped set the stage with your most successful "Main Street" program, which has helped to revitalize the social, economic and cultural life of numerous Canadian communities. I'm proud to say that Calgary has benefited from this program. Your support helped get the Alberta Main Street Program up and running. Today, it is flourishing with 23 communities on its list—up from five in 1993. By the way, we have six national historic sites, the first being Fort Calgary, designated in 1925, and the latest the Palace Theatre, designated in 1996.

You are the guardians of historic treasures found all across Canada, from Newfoundland to Quebec to Ontario and westward and up North.

You have impressed on Canadians the importance of heritage issues, not just in promoting Heritage Day, but by providing information through your *Heritage* magazine and on your Web site.

The recent introduction of the Prince of Wales Prize is an incentive to local governments to strengthen their commitment to the preservation of built heritage within their jurisdictions.

You are to be congratulated for becoming a partner in the Young Canada Works program and the International Internship Program, ensuring that interest in heritage preservation doesn't stop with this generation.

The Government of Canada shares your enthusiasm and your respect for Canada's heritage. We also share your concern about its preservation—particularly the preservation of our built heritage, which is a fragile entity in the face of time, weather and development.

In the federal Budget for 2000, the government announced that it will encourage initiatives to preserve and restore the built heritage of Canada. We look to develop intergovernmental projects and to collaborate with heritage groups from all corners of Canada in order to find a way to encourage citizens to protect Canada's historic sites.

Preserving the past is not about living in the past. It is about creating a solid base on which to build our future. Without knowing where we've been, it is hard to know where we're going.

Our built heritage is a visible reminder of our history, our achievements, our successes, and sometimes, our failures. It is an important record of a social learning process, because a building is also about people. It's about the people who built it and the people who used it. Their lives and their activities have shaped our lives and activities.

We—the Heritage Canada Foundation, governments and others—have been working hard to preserve our built heritage. We've accomplished a lot, but the fact remains that, in the past 30 years, 21% of pre-1920 building stock has been demolished. These buildings are gone for all time. We need to find a way to prevent that kind of loss.

Over the last year and a half, the Department of Canadian Heritage and Parks Canada have held discussions with potential partners, officials and stakeholders representing many different communities, including Aboriginal peoples, the heritage and business community, and the Heritage Canada Foundation, on ways to enhance the preservation of historic places. Discussions are focussed on a number of issues, including a national register of heritage places and conservation standards.

The idea of a National Trust is also one of the key elements in this preservation initiative, and this annual meeting is also an opportunity for an exchange of ideas. A number of other countries have successfully implemented National Trusts that have suited their individual needs. There is every reason to believe that the time is ripe in Canada for the creation of a National Trust—one that suits our situation and needs.

A National Trust in Canada could be a great gathering of people in support of heritage—government, non-government and corporate. It could take a leadership role in championing heritage, in public education, in fund raising and granting, in brokering properties and in membership.

The success of the project depends not only on the tools at your disposal, but also on the participation and the engagement of all Canadians, and that includes the provinces, territories, municipalities, business, heritage groups and Aboriginal organizations.

This is a lot to ask, but Canadians have repeatedly expressed their support for the preservation of built and archaeological heritage. The will is evident on all sides for increased protection of our heritage places.

The Government of Canada is committed to continuing its consultation process, and our collaboration with other sectors, to ensure the continuity of our historic places.

Closing Remarks

Michael Kluckner, *Chair of HCF Board of Governors*

There have been comments throughout this conference from people who are still uncertain of what a national trust might be. I look at this as indicating that we are very much still in the midst of the consultation process. This conference and its themes were not a roll-out of some already created model that is to be foisted upon the Canadian heritage community. We're doing this as part of the broad-based historic places initiative of the federal government.

To answer the question of why Heritage Canada isn't a national trust now, there are pieces missing from the puzzle. We have heard how, on the matter of stewardship, there is an unsympathetic tax regime that makes donations of real property very difficult for the donors, so it's hard for an agent of national stewardship to get under way under the current situation. As for granting, Heritage Canada is currently unable to give grants. We cannot do it under the terms of our incorporation, so that is one reason why Heritage Canada does not operate in a national trust fashion. When you combine that together with how the federal tax system makes it difficult to arrange partnerships with philanthropic individual Canadians and corporations, I think it sums up both where the need is in this country for something to be done and our current inability to do whatever it is.

We have also heard about the urgency of our need to educate and inform Canadians, particularly the new generation, to be sure that our Canadianness is not lost in the globalization that is happening with the Web. And we've heard something about legal advocacy and the potential pitfalls that might arise should Heritage Canada or the future national trust for Canada, go the way of the National Trust for Historic Preservation in the United States. As we all know, that is a much more litigious society than Canada.

Laurier LaPierre, in his presentation about constituency, claimed that new Canadians were uninterested because the heritage message was too narrow. But I have attended Vancouver heritage awards ceremonies for the past few years at which probably half the awards given out went to new Canadians of Asian descent for working on built heritage projects. Now why are they doing it and other people aren't? The really simple answer is because they have money, and a lot of the work that goes on requires money. Also, volunteerism requires money to create time, and I think that shows there are always going to be Canadians who have other priorities. But as has been indicated very clearly by the survey, we have a broad range of public support for the preservation of built heritage in Canada. This survey indicated that 90% of Canadians feel that heritage conservation is either very important or somewhat important. Now that's a constituency 90%! Nearly three in four believe that the formation of a national trust will improve heritage conservation in Canada: 75%, plus or minus 7% 19 times out of 20.

Clearly, the work we wished to do has broad public support within Canada. But I remain puzzled by all of this because I wonder when people, either at this conference or someone who answered the survey, heard the words "national trust" and, obviously it had a preamble, what image would pop into an individual Canadian's mind when thinking of a national trust? Would it be a historic site with a plaque on it? Would it be a row of heritage houses with families living in them? Would it be a railway station in a little town converted into a dance studio? Would it be a cultural site like Head-Smashed-In-Buffalo Jump? I would wager it would be all of them.

So how would these individual Canadians relate to the heritage experience? Well, they might own a building that is part of a National Trust network of designated buildings across the country. They might go on a walking tour, they might take a holiday and see mountains and bears one day and a little church the next, or they might shop on a town's main street with restored buildings rather than going to a mall. All of these are, and will be, aspects of Canadians' experiences of their built heritage and cultural landscape as long as we don't let it slip away from them. Will the average Canadian care who did the work? Was it a provincial trust? Was it Heritage Canada? Was it Parks Canada? Was it an individual owner with his own money? I tend to think not. Canadians want to relate a site over here to one over there. So, somehow, what I think we need to do is create a national brand that says "historic place in Canada," one that Canadians can then experience. Equally, and that the people who own these sites or who manage them should feel as if they're part of a unified national sea-to-sea-to-sea system of historic places.

As a number of speakers have said over the last two days, you use a heritage site to tell a story. My concern with so much of the argument about history teaching in Canada is that it is taking place in a virtual world. There is no physical relationship with the country in which the stories took place. We have to preserve the sites. We have to let Canada evolve as a nation and as a landscape, but the sites within there have to be preserved or the stories will eventually die and be meaningless. As we lose our historic places, we will lose our culture.

So I think it is fair to say that the consultation continues and, from Heritage Canada's point of view, this conference is part of the process. We will have a discussion page or listserv, up this autumn on www.heritagecanada.org. I hope you will participate in this. None of this is set in concrete, wood, stone or the heritage building material of your choice. This is all up there and we're trying to build something that is a "made in Canada" solution.