

# MAKE HISTORY.

Preserve Manitoba's Past.



## MAKE IT WORK: a Sustainability Workbook for Historic Places



Canada's  
Historic Places

Lieux patrimoniaux  
du Canada

Manitoba 

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Friends of the Emmanuel Church Inc.	Holland
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Cover photos: (Clockwise from top)  
Villa Tulla Farmhouse, Lac du Bonnet;  
St. Paul’s Anglican Church, St. François, Xavier area, MB.



## MAKE IT WORK: a Sustainability Workbook for Historic Places

This workbook is a self-assessment tool to help you identify the strengths and challenges associated with making your historic place sustainable so it can be enjoyed for generations to come. A sustainable site is one where the financial, physical and human resources have been planned for and organized to ensure the site's long-term stability and use.

Assessing the sustainability of a historic place is an important first step in addressing areas of concern about a particular project or site. It allows you to take an overall look at your planning and explore areas you may not have considered. Whether you own a heritage building, represent a municipality that owns a heritage site, or are part of an organization responsible for managing and/or advising others on heritage properties, you are sure to find this workbook useful.

### Goals

This workbook was created to help you:

- focus your sustainability goals
- work cost-effectively with consultants
- achieve greater success with grant applications
- successfully sell your ideas to other community members to gain support for the project and/or secure potential partnerships

To effectively evaluate a project, you must understand the factors that influence its sustainability. This workbook is divided into three sections. Each section deals with a key factor affecting the sustainability of a historic site:

**SECTION 1:** the physical **condition** of the site

**SECTION 2:** the **people** involved with the site

**SECTION 3:** the **financial** resources needed to make the site sustainable

If one of these factors has been identified as a priority for your site, you may wish to focus on that factor. However, all three sections are interrelated and, regardless of the immediate priorities each factor should, eventually, be looked at and considered.



## Using this workbook

A self-assessment is most accurate and useful when several site stakeholders are involved in completing it. Since you will be asked to make many subjective judgments, you may find the workbook triggers discussions about issues not yet addressed by your group.

The workbook will lead you through a series of statements to help you make choices about the future of your historic place. Each statement will be accompanied by some explanatory text and recommendations for resources you can use that will help meet your project's needs. A list of all reference material is available in the Appendix included at the end of the workbook. Hard copies of select resources can be mailed to you upon request. Call the Historic Resources Branch at 1-800-282-8069 ext. 3844 for more information or to request copies.

Use the space below each statement to make notes about the opinions of the work group, decisions to be made, challenges to address, tasks to be completed, and so on. The notes may reflect the group's understanding of where the project stands now, and what is envisioned for the future. If the group can't agree on a particular question, record the different opinions. Then go back and re-examine them once the section has been completed.

Because this workbook has been created to address a range of projects managed by a wide variety of people, some of the statements may not apply to your situation. However, it may still be worthwhile to read the entire text and take note of all recommendations. The intent is that as you go through the statements, your vision for the site will become clearer and lead to more informed decisions.

Remember that this workbook is a diagnostic tool, not a test that you pass or fail. Think of it as a chance to learn not only about your group and project, but also about sound planning practices in general.



## Next steps

At the end of each section is an **Implementation Plan** that can be customized to your particular situation. For each statement where you've identified a need for action, go to the corresponding Implementation Plan and complete the action steps for that item.

In the space provided list the date or timeline for completing the action, the name of the person primarily responsible for completing it, any costs associated with its completion, and any other comments that will help ensure the item is implemented. (Of course, you can't work on everything at once. Use the workbook to help you prioritize the areas that most urgently need work.)

If the completed self-assessment shows your organization needs considerable work in most or all of the sections, chances are your organization is either relatively young or has been struggling with persistent problems for some time.

Conducting this self-assessment should provide some ideas for new directions or approaches that could revitalize the project. If not, perhaps it's time to discuss whether this project is the right one for your group/community. Perhaps there is a different site, initiative or community project more likely to gain support or attract enthusiastic volunteers. In any case, you may want to bring in a consultant who can help with your overall organizational development, or with specific challenges.

## UNDERSTANDING YOUR HISTORIC PLACE

A full understanding of your historic place is essential to ensuring good conservation practices. This part of the workbook will help you better understand the site by looking at it from four perspectives:

- Project vision
- Heritage value and character-defining elements
- Planned use
- Current challenges

### Project vision

*Do we have a clear, or relatively clear, vision of the goals for the heritage site or building?*

Having a cohesive vision for your project is an important first step. This will keep everyone focused on the end goal, allowing for a more effective completion of this workbook. If you're already planning a particular conservation intervention for your site, it's important that all stakeholders share the vision for the site's preservation, rehabilitation or restoration.



*Why are we undertaking this project?*

There are many possible answers, including:

- protection of our heritage
- tourism
- community pride
- personal use
- commercial gain
- education

*Why now?*

*What do we hope to achieve?*

*Will we need to make physical changes to our historic place?*


These are all questions that will help you identify your project's vision, and keep it clear in your mind as you proceed through the sections of this workbook.

## **Heritage value and character-defining elements**

Before proceeding with any project at a historic place, it's essential to understand the site's heritage value and its character-defining elements. **Heritage value** is the aesthetic, historic, scientific, cultural, social or spiritual importance or significance of a historic place for past, present or future generations. Understanding heritage value is crucial no matter what the circumstances – whether the site is already protected as an official heritage site, is currently being considered for heritage designation, or is recognized informally as having significance to you and your community.

Exploring heritage value will illuminate how the site relates to its surroundings and why it was or is important to the past, present and future of the community. Understanding why the site is significant will help you ensure that any decisions made about the site don't jeopardize those values.

The **character-defining elements** (CDEs) are the physical qualities of the site that embody its heritage values. For buildings, the CDEs are typically things like architectural or design features and/or materials, and sometimes interior details. Having a list of your site's character-defining elements will help you make informed decisions about future physical alterations. For municipally or provincially designated heritage sites, a **Statement of Significance** (SoS) outlines the heritage value and character-defining elements of the historic place. Statements of Significance for many of Canada's historic places can be found online at [www.historicplaces.ca](http://www.historicplaces.ca).



Additional resources to help site stewards and building owners identify the heritage value and character-defining elements of their historic places can be requested from the Historic Resources Branch or viewed online at [www.manitoba.ca/heritage](http://www.manitoba.ca/heritage) under the link “[Heritage Site Owners.](#)”

Once you understand why your historic place is important (the values), and what parts are most important to preserve (the CDEs), then you can start thinking about how you want to use it. While the original function is often the best use for a historic place, there are times when a new function must be considered simply to sustain the site into the future. Exploring the options before any decisions are made can help you justify your decision(s) to potential supporters, and ensure a more secure future for your historic place.

Finally, it's important to know of any current challenges that could affect your historic place. Identifying these challenges will help you prioritize your activities and goals. It will also help you decide, as you proceed through this workbook, which sections require greater focus.

## **Planned use**

*How do you intend to use and/or re-use your historic place?*

No project can be effectively evaluated without an understanding of the community's needs. Public need will inevitably affect the long-term viability of the project. There is no sense in proposing a re-use for your heritage site that's already adequately served in the community, or that is not seen as necessary. Talking to your economic development officer, local business owners and heritage advisors may help you determine some options for the site's use.

If your historic site can no longer be used for its original function, consider adaptive re-use options that are sympathetic to the original function. Ideally, your historic place should be actively used, relevant to the community, and should have a revenue stream to assist with maintenance or operating costs.

The following chart lists several broad types of use, divided into specific functions within each 'use' category. Some sites are better suited to certain types of use. For example, older heritage homes have successfully been adapted for use as museums, tea houses, bed-and-breakfasts and art galleries. However, don't limit yourself to only these types of use, especially at the concept development stage. Sometimes the most successful sites are the ones with the most creative uses. Also, some sites might be suitable for multiple uses, so consider whether several of these options might complement one another.



## USE / RE-USE MATRIX

Type of Use	<b>EXAMPLES</b> (Note: Cross out examples as options are eliminated.)				
Residential	Single family	Multi-family			
Temporary lodging	Hotel/Motel/B&B	Dormitory	Group home	Affordable housing	Emergency Shelter
Store & Commercial	Retail Store	Restaurant/Bar			
Office	Professional	Bank	Medical office		
Civic	Municipal Office	Police Office	Fire Station	Courthouse	
Leisure, Entertainment or Athletic	Theatre	Gallery	Gym or Fitness centre	Studio	Personal services (day spa, salon)
Educational, Social or Religious	School	Community Centre or Drop-in Centre	Museum or Library	Church/Synagogue/Mosque	Daycare
Industrial	Manufacturing	Assembly	Laboratory	Specialized Testing	
Warehouse or Storage	Covered parking or Garage	Warehouse	Cold Storage	Mini Storage	
Other					



## Current challenges - Setting priorities

If you are considering the adaptive re-use of a heritage building, be sure to explore practical issues such as restrictive bylaws, building codes and zoning or other regulations (beyond heritage) that may challenge the feasibility of your vision. Consider revising, simplifying or refocusing your vision, if necessary.

Ultimately, it will be up to your group to decide whether you want to challenge outside restrictions. Be aware that financial matters typically pose the greatest challenge for many heritage projects. You may not have a proper sense of the funding required for your project until a detailed condition assessment or feasibility study has been completed.

Finally, without a champion – someone to spearhead the initiative – and a group of committed individuals to carry out the necessary tasks, a strong vision and adequate funds will sit idle.

Begin this workbook at the section you feel poses the most immediate and important challenges for your historic site. Focus on one section at a time and give this section the attention it deserves. As further challenges arise, or as time allows, you can work through additional sections of the workbook.



Historic photo of Harley House, Swan River.



## SECTION 1: CONDITION

The intent of Section 1 is to focus on the physical aspects of your site and how they affect its ongoing sustainability. It is critical that you understand the condition of your site, its planned purpose, and the effort and costs required to sustain and possibly improve it.

This section will emphasize the current state of your site, what kind of physical changes you may be planning to make, and what needs to be done to maintain it now, and once any alterations have been carried out. Collect feedback from workgroup members and record the group consensus in the Discussion section of each statement. If the group answers 'no' or 'in progress' to a question, consider adding that item number to the Implementation Plan at the end of the section. A list of all review material website links is available in the Appendix included at the back of this workbook.

Once you get there, the Implementation Plan will provide you with a roadmap of the work ahead in achieving your heritage site's sustainability.

### **C.1** The site is safe to work on.

Discussion:

- Yes
- No
- In progress

Before you or any contractors begin working on or near your site, safety must be given first priority. Safety concerns to look for include health hazards such as lead, asbestos or mould. You should also be aware of Manitoba's [Workplace Health and Safety](#) regulations.

Once the site is safe, one of your first priorities should be to stabilize it (if necessary) to prevent further decay and/or damage until you are ready to go ahead with additional rehabilitation or restoration.

#### **Review Online:**

- [HRB's Heritage Building Maintenance Manual: Pre-Planning and Corrective and Emergency Maintenance \(pdf\)](#)
- [Manitoba's Health and Safety Act](#)
- [Workplace Safety](#)
- [Canadian Mortgage and Housing Corporation: Your Home and Your Health](#)

**C.2** There are external threats to the condition/integrity of this site.

Discussion:

- Yes
- No
- In progress

External threats may include:

- vandalism
- demolition
- erosion
- encroachment by new development
- cost of delayed action

Showing an interest in the site can lessen the risk of vandalism. Tidy it up to make it less appealing to vandals and arsonists, repair leaks and board broken windows, and make sure all doors are secure.

NOTE: Surface cleaning can damage historic material. Methods that erode surface material, such as sandblasting of brick, metal or wood, are not recommended. Building community awareness and support can help you if your site is threatened by demolition or encroachment by new development. There may be people willing to offer support in protecting the site.

**Contact:**

Historic Resources Branch and ask about Crime Prevention Through Environmental Design (CPTED) strategies; call 204-488-3844 in Winnipeg; or toll free 1-800-282-8069 ext. 3844

**Review Online:**

- [Winnipeg Police Service. Graffiti Prevention](#)
- [NPS Preservation Brief #38: Removing Graffiti from Historic Masonry](#)
- [Crime Prevention Through Environmental Design \(CPTED\) Guidelines](#) (pdf)



**C.3** The site is suitable for its original use, or a use that is sympathetic to its original purpose.

Discussion:

- Yes
- No
- In progress

**C.4** We are confident in the physical changes we want to make to the historic place.

Discussion:

- Yes
- No
- In progress

If your site can no longer be used for its original use, consider adaptive re-use options that are sympathetic to your site's original purpose. Ideally, your historic place should be actively used, relevant to your community, and should incorporate some means of revenue generation to help with maintenance costs.

#### **Review Online:**

- [Municipal Designation: Is it Right for You?](#) (pdf)
- [HRB Infobulletin on Preserving Heritage Buildings](#) (pdf)

Consider what attributes make the historic place appropriate for the proposed use. What are its character-defining elements? Can you retain or even celebrate them with the proposed use? Would any elements pose problems for the proposed use?

#### **Contact:**

Historic Resources Branch and ask about making changes to a historic place; call 204-488-3844 in Winnipeg; or toll free 1-800-282-8069 ext. 3844

#### **Review Online:**

- [HRB's Municipal Designation: Is it right for you?](#) (pdf)
- [Standards and Guidelines for the Conservation of Historic Places in Canada](#)
- HRB's How-To-Series 6: Developing a Conservation Strategy for a Heritage Building. Call the Historic Resources Branch to request a copy.

**C.5** We are familiar with the different forms of conservation and have considered each of these before deciding if the proposed intervention is appropriate.

Discussion:

- Yes
- No
- In progress

In Canada, conservation is a broad term used to describe three types of activities: preservation, rehabilitation and restoration. See the key recommendations for successful conservation projects found in the *Standards and Guidelines for the Conservation of Historic Places in Canada*. Give each of these strategies serious thought before committing to a plan of action. In addition to varying costs for each, your decision should be influenced by what you see as the end use of the site, and its intrinsic heritage value.

**Review Online:**

- [Standards and Guidelines for the Conservation of Historic Places in Canada](#)
- [HRB Infobulletin on Preserving Heritage Buildings](#) (pdf)

**C.6** We have researched the permits and authorization necessary to begin alterations.

Discussion:

- Yes
- No
- In progress

Making changes to your historic site may require heritage permits, zoning amendments, or permission from the owner or city/town/municipality.

**Contact:**

- the owner and/or the local municipality
- your local MHAC ([Municipal Heritage Advisory Committee](#))

**Review Online:**

- [BizPaL online](#) is a one-stop service for entrepreneurs that simplifies finding information on business permits and licences from all levels of government (Not all municipalities are using this service, so consult your local municipal office.)



**C.7** We are aware of guidelines and standards created for the repair, alteration and maintenance of heritage places.

Discussion:

- Yes
- No
- In progress

While most renovation techniques for heritage sites are the same as modern building practices, there are specific approaches that will help you retain the maximum heritage value of your site. It is recommended that you review the standards and guidelines created specifically for alterations to historic places.

**Contact:**

Historic Resources Branch and ask about ‘making changes to a historic place’ 204-488-3844 in Winnipeg; toll free 1-800-282-8069 ext. 3844.

**Review Online:**

- [‘Guidelines for Buildings’](#) from the Standards and Guidelines for the Conservation of Historic Places in Canada.
- [HRB’s Heritage Building Maintenance Manual](#) (pdf)

**C.8** We are comfortable hiring experts such as engineers, architects and contractors to complete work on the site/ building.

Discussion:

- Yes
- No
- In progress

While any reputable professionals should be competent to help you with your project, it is important to ask some specific questions before hiring anyone. Do they have previous experience working on heritage sites? What kind of liability insurance do they carry? Can they provide you with at least three references for similar projects they have completed?

**Review Online:**

[HRB’s Heritage Building Maintenance Manual](#): Hiring a Professional (pdf)

**C.9** We have a maintenance program in place to control deterioration until work on the site is complete.

Discussion:

- Yes
- No
- In progress

Maintenance must be considered during the planning stages of the project. Planning, fund-raising and organizing can often take years. Left uncared for, buildings will likely continue to slowly degrade, making repair and upgrade costs higher once the project is approved for action.

**Review Online:**

- [HRB's Heritage Building Maintenance Manual: Worksheets](#) (pdf)

**C.10** We have developed a regular maintenance plan to care for the site once it is operational.

Discussion:

- Yes
- No
- In progress

Maintenance costs for heritage sites and buildings vary considerably. The exterior elements of a historic place often have the most heritage value, so they will likely be the focus of your maintenance efforts.

**Review Online:**

- [HRB's Heritage Building Maintenance Manual: Worksheets](#) (pdf)



## Section 1: Condition Implementation Plan

The following table is a template to keep track of each action item you identified in the section on CONDITION. For every item that requires further attention, note it in the table below. Identify when you plan to complete that task (timeline), who will be primarily responsible for completing it (lead role), what the anticipated costs will be (cost), and any other comments that will ensure the task is completed properly (comments). You can then prioritize the items based on your timeline, or indicate the priority of each item as: H= high M= medium L= low.

Item	Action Required	Timeline	Lead Role	Cost	Comments





## SECTION 2: PEOPLE

This section will help you ensure you have the people you'll need to implement your sustainability goals. It focuses on the human aspect of your heritage site – the people who will operate it, manage it and support it. Both internal operations and external support are considered, emphasizing the need for strong leadership and community awareness.

Collect feedback from workgroup members and record consensus in the “Discussion” section of each question. If the group answers “no” or “in progress” to a question, consider adding that statement to the Implementation Plan at the end of the section. Afterwards, the plan will provide you with a clear roadmap of the work ahead.

A list of all review material website links is available in the Appendix included at the back of this workbook.

**P.1** The historic place is managed by a board or other organization.

Discussion:

- Yes
- No
- In progress

Individual and board management both have advantages. However, a board brings a larger pool of expertise and resources, and a stronger collective voice to implement new projects. It may be challenging to find board consensus on issues that need to be resolved. Generally, the larger your heritage site (and future plans for it), and the more importance the site has to the community/province/country as a whole, the more advantage there may be to board management.

### Contact:

[Volunteer Manitoba](#) -- for Quick Answers to Quick Questions consultation service for boards; or custom workshops -- 204-477-5180 ext. 224 in Winnipeg; toll free 1-888-922-4545 ext. 224; e-mail [vmtraining@mts.net](mailto:vmtraining@mts.net);

### Review Online:

- [Volunteer Manitoba Lunch Time Learning Events](#)



## **PEOPLE:** *Internal Operation*

**P.2** Are there regularly scheduled meetings of the group?

To be effective, your group should meet regularly, follow an agenda and keep proper minutes. Ideally, your group should also have a mission statement and defined roles and responsibilities for its members.

Discussion:

- Yes
- No
- In progress

**P.3** The board, volunteers and/or staff have adequate knowledge and skills to perform our duties effectively. We are able to operate and manage the historic place in the following critical areas:

Over-estimating your abilities and availability can create some challenges. For every role needed to operate your heritage site, make a detailed list of all the critical skills required for that position. Where there are gaps between what is required and the skills and knowledge that you and your staff or fellow volunteers currently possess, actively seek to upgrade your collective abilities, or at the very least know when it's time to hire a professional.

- site management
- finances
- fundraising
- working with the public
- site maintenance

### **Contact:**

[Volunteer Manitoba](#) -- for Quick Answers to Quick Questions consultation service for boards; or custom workshops -- 204-477-5180 ext. 224 in Winnipeg; toll free 1-888-922-4545 ext. 224; e-mail: [vmtraining@mts.net](mailto:vmtraining@mts.net)

Discussion:

- Yes
- No
- In progress

### **Review Online:**

- [Volunteer Manitoba Board Development Series](#)
- [Volunteer Manitoba Lunch Time Learning Events](#)
- [Sport Manitoba Board Self-Assessment](#) (pdf)



**P.4** Ongoing organizational development and training is sought out and encouraged.

Discussion:

- Yes
- No
- In progress

Workshops on organizational development and effectiveness are available throughout the year to strengthen the skills necessary to sustain your historic place.

**Review Online:**

- [Volunteer Manitoba Organization Management Series](#)

**P.5** There is a cohesive, shared vision for the future of this historic place that addresses the needs of the community.

Discussion:

- Yes
- No
- In progress

It is critical to the success of the heritage site that the individual or board/organization managing it has a clear, focused vision for its future. If the board is unable to reach consensus on its own, consider a mediator to reach agreement. It is also important that the vision address a need in the community.

**Contact:**

[Volunteer Manitoba resource library](#) and ask about creating a vision 204-477-5180 ext. 223 in Winnipeg; toll free 1-888-922-4545 ext. 223, e-mail [vmresource@mts.net](mailto:vmresource@mts.net)

**P.6** We have strong volunteer support.

Discussion:

- Yes
- No
- In progress

Many heritage sites operate on a limited budget and paid staff positions are limited or impossible. Recruiting volunteers is a cost effective alternative. You may need to launch an awareness campaign to get word out in the community. Think of other ways you can reward helpers for their time and make it worth their while. Sometimes people volunteer so they can gain skills or knowledge that will help them with their career goals. What can you offer to your volunteers?

**Review Online:**

- [HRB's Municipal Heritage Resource Guide: Section 4-12](#) (pdf)
- [Volunteer Manitoba Volunteer Management Series](#)
- [HRB's Guide to Employing Students](#) (pdf)
- [Canadian Heritage: Promoting Volunteerism](#) (pdf)



**P.7** We have identified an audience or user group for the historic place.

Discussion:

- Yes
- No
- In progress

Before you decide what to do with your site, make sure that you understand for whom or what you are doing it, and whether you are fulfilling a true need in the community or following your own assumptions about what the community needs. Collaboration with participating groups or stakeholders is recommended.

**P.8** We have the support of a local community heritage organization and/or Municipal Heritage Advisory Committee (MHAC).

Discussion:

- Yes
- No
- In progress

Make a point of sharing information about your heritage site with any other community organization interested in heritage in your area such as tourism operators, schools or economic development departments. If they don't know about your site, they can't offer advice and support. Create a brief information package about your site and distribute it or ask to meet with each of these groups to present your heritage site or building in person.

**Review Online:**

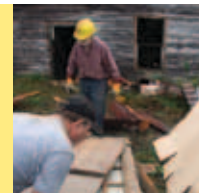
- [HRB's Guide to Marketing and Promoting Heritage Organizations](#) (pdf)

**P.9** We have contacted our municipal and/or regional office to discuss the historic place.

Discussion:

- Yes
- No
- In progress

Your municipal and/or regional office should be aware of your site and your intentions for it. In addition to providing assistance and support, there may be zoning, heritage permit, or other activity bylaws you need to be aware of before proceeding with your plans.



**P.10** We have contacted the provincial Historic Resources Branch (HRB) to discuss the historic place.

Discussion:

- Yes
- No
- In progress

HRB can offer knowledge, expertise and guidance on your heritage site, including information on research and architectural history, available grants and heritage designation. For designated buildings, HRB can advise you on how to conserve and maintain your heritage buildings and manage heritage resources in your community.

**Contact:**

Historic Resources Branch 204-488-3844 in Winnipeg; toll free 1-800-282-8069 ext. 3844 or visit [www.manitoba.ca/heritage](http://www.manitoba.ca/heritage)

**P.11** We have generated positive awareness within the community about the historic place and its importance.

Discussion:

- Yes
- No
- In progress

The value of community support for your heritage site cannot be overstated. The more awareness you generate, and the more people understand the significance and value of your site, the easier it will be to gain support for future initiatives. It will also make recruiting volunteers much easier. A well-developed marketing plan can help you identify effective ways of promoting your site, including pamphlets, a website, special events, a press release, etc. Consider:

- holding an open house
- developing a website
- contacting the local newspaper about running a story on your site
- working with your local library to organize a speakers' series on history and heritage topics

**Contact:**

Volunteer Manitoba resource library and ask about marketing and media relations 204-477-5180 ext. 223 in Winnipeg; toll free 1-888-922-4545 ext. 223; e-mail [vmresource@mts.net](mailto:vmresource@mts.net)

**Review Online:**

- [Canadian Heritage Publicity!: How You Can Publicize Volunteerism In Your Community](#) (pdf)
- [HRB's Guide to Marketing and Promoting Heritage Organizations](#) (pdf)



## Section 2: People Implementation Plan

The following table is a template that allows you to keep track of each action item you identified in the section on PEOPLE. For every item that requires further attention, note it in the table below. Identify when you plan to complete that task (timeline), who will be primarily responsible for completing it (lead role), what the anticipated costs will be (cost), and any other comments you wish to add that will ensure the task is completed properly (comments). You can then prioritize the items based on your timeline, or alternatively indicate the priority of each item as: H= high M= medium L= low.

Item	Action Required	Timeline	Lead Role	Cost	Comments



## SECTION 3: FINANCIAL

This section will help you organize the financial resources you'll need to move forward with your sustainability plan. It focuses on the financial elements of your heritage site: what it might cost to conserve it; to operate it; to maintain it; where these funds might come from. Collect feedback from workgroup members and record the group consensus in the discussion section of each question. If the group answers "no" or "in progress" to a question consider adding that item number to the implementation plan at the end of the section. Afterwards, the Implementation Plan will provide you with a clear roadmap of the work ahead to achieve your heritage site's sustainability.

A list of all review material website links is available in the Appendix included at the back of this workbook.

### Review Online:

[Canada-Manitoba Business Service Centre](#) and visit the [Manitoba Business Guide](#)

### FINANCIAL Budget

**F.1** Have annual operating costs been recorded in a detailed budget?

Discussion:

- Yes
- No
- In progress

Without an annual operating budget you cannot begin to manage your finances. At the very least your budget should include all of your anticipated costs and expected revenues. Try to think of everything and be realistic about anticipated revenues and costs.

### Contact:

Volunteer Manitoba resource library and ask about financial management 204-477-5180 ext. 223 in Winnipeg; toll free 1-888-922-4545 ext. 223; e-mail [vmresource@mts.net](mailto:vmresource@mts.net)

### Review Online:

- [Volunteer Manitoba](#)



**F.2** We have sufficient cash flow throughout the year.

Discussion:

- Yes
- No
- In progress

Monitoring cash flow is a critical element of your finances. Finding yourself in a negative cash flow situation (when expenses outweigh revenues) for more than a couple of months can mean failure. Be sure to plan for the months where you anticipate low income, and either set aside cash or make arrangements for alternate sources of revenue. You may be able to get a short-term line of credit from a bank until your cash flow is positive.

**F.3** We have a three-year financial forecast.

Discussion:

- Yes
- No
- In progress

Preparing a budget for a single operating year is wise, but you also have to think longer term. When creating a three-year financial forecast remember that the costs of certain goods and services may increase, and that some of your revenue sources may see growth, or may cease to exist (ex: funding programs or grants). You also need to plan for any expected special events, such as heritage celebrations or physical site upgrades. If you can't show site viability for at least the next three years, you'll need to look at ways to minimize your costs and increase revenue.

**F.4** We complete income statements on the heritage site/building regularly.

Discussion:

- Yes
- No
- In progress

An income statement can also be called a profit and loss (P&L) statement. Income statements show you how sound your financial situation is at a particular time. Basically, it shows you what your expenses were, what your costs were (capital and operating) and what your profits were during that period.



## Expenses: Capital

**F.5** We know what the historic place conservation costs will be.

Discussion:

- Yes
- No
- In progress

The final budget needs to consider: what needs to be done to your site to prevent it from further deterioration, and what will that cost? You then need to plan for it, decide what needs to be done to your site to allow it to continue to be used for its current purpose, or to be used for an alternative purpose, without negatively affecting its heritage character. You may be planning to restore your heritage site to its original character - what will that cost? If in doubt, consider talking to a local contractor who is willing to estimate costs for you.

## Expenses: Operating

**F.6** We have sufficient insurance that is priced competitively.

Discussion:

- Yes
- No
- In progress

If you believe your site has any monetary value at all, proper insurance is strongly advised. It is usually wise to obtain quotes from several insurance companies, and make sure that each offers the specific kind of coverage you need. If you are going to have people visiting or working at your site, ask about liability coverage. Ask a lot of questions, and if possible, work with a company that is familiar with heritage sites.

### Contact:

Insurance Bureau of Canada Consumer Information Centre at 1-800-377-6378. Monday to Friday 8:00 a.m. to 6:00 p.m. Voice mail is available 24 hours.

Volunteer Manitoba resource library and ask about board liability and insurance 204-477-5180 ext. 223 in Winnipeg; toll free 1-888-922- 4545 ext. 223; e-mail [vmresource@mts.net](mailto:vmresource@mts.net)

### Review Online:

[Insurance Bureau of Canada's: Insuring Old Homes in Nova Scotia](#) (pdf)



**F.7** We have an emergency/contingency fund set aside.

Discussion:

- Yes
- No
- In progress

Even good financial planning can't predict every situation. Floods, fires or unforeseen repairs can all have significant impacts on your heritage site. Set aside some money to cover some of these costs.

**F.8** We know what our maintenance costs are.

Discussion:

- Yes
- No
- In progress

Using your maintenance schedule (see the section on Condition), assign costs to each activity. It is recommended that approximately one per cent to three per cent of your property value be budgeted annually for maintenance.

#### **Review Online:**

- [HRB's Heritage Building Maintenance Manual: Worksheets](#) (pdf)

**F.9** We have budgeted for staffing costs.

Discussion:

- Yes
- No
- In progress

Do you use staff to manage your site? Are they paid on a salary, hourly, or contract basis? Is there a way to streamline your staffing costs and maximize their contribution? Identify all of your staffing costs and look for ways to make them more efficient. Also, are you volunteering your time, or is this a business venture for you? If this is going to be your revenue source, include a salary for yourself.

**F.10** We have a marketing plan and marketing budget.

Discussion:

- Yes
- No
- In progress

If you are trying to attract visitors or investors, or if you are looking for tenants to rent from you, a well thought-out marketing plan is needed. A basic marketing plan is not too difficult to create – dozens of good templates are available online or from business service centres. If your marketing plan is more complex, seek professional assistance. Many templates are free. Professional consultation fees will vary.

#### **Review Online:**

- [Interactive Business Planner from the Canada-Manitoba Business Service Centre.](#)

**F.11** We know what our utilities will be each month.

Discussion:

- Yes
- No
- In progress

If your site or building is serviced, you may be paying for various utilities each month (ex: water, gas, electricity, telephone, internet). Look for ways to minimize your utility costs, such as incorporating low energy technologies. Of course more visitors, more time spent at the site, and more tenants will increase some of your utility costs – plan for peaks and valleys as well.

**Review Online:**

- [HRB's Green Guide to Heritage Conservation](#)

**F.12** We are aware of various funding programs and grants available to help with financial needs.

Discussion:

- Yes
- No
- In progress

Funding programs, loans and grants exist to help with heritage sites and buildings. Some are provincial, some federal, and some incentive programs may be offered through your city or municipality. Be ready to spell out your site/building's condition, your goals for it, and what you hope to do with the financial assistance. Additionally, it can be very helpful to cultivate a positive relationship with the representatives of these funding programs. Their job is to help administer funds to suitable projects, and they can help guide you through the process more effectively.

**Contact:**

Volunteer Manitoba about using the Canadian Directory of Foundations to look up grant agencies for funding.

**Review Online:**

- [HRB's Municipal Heritage Resource Guide: Section 4-12](#) (pdf)
- [CHT Heritage Grants Program](#)



## Revenue and Funding

**F.13** We have a fundraising plan.

Discussion:

- Yes
- No
- In progress

Fundraising can raise revenue for your project and help develop community awareness, support, and pride in your heritage site. Examples of community fundraisers include bake sales, dinners, special events, raffles, concerts, or asking sponsors to sponsor bricks for a path or to adopt windows, doors, seats, etc. The possibilities are almost endless and the results can be surprising.

### Review Online:

- [Canadian Fundraising & Philanthropy](#)
- [Canadian Heritage Fundraising Resources](#)
- [Fundraising Ideas that Work for Grass Roots Groups](#) (pdf)
- [Face to Face: How to Get Bigger Donations from Very Generous People](#) (pdf)
- [Guide to Special Event Fund Raising](#) (pdf)
- [How to Estimate the Economic Contribution of Volunteer Work](#) (pdf)

**F.14** We know how to complete application forms and proposals to access funding programs and grants, and have applied for all that are applicable to our situation.

Discussion:

- Yes
- No
- In progress

While every application form is unique, most have a few things in common. The more clearly and concisely you can explain your project, and the more closely your request matches the purpose of the particular fund or grant you are applying to, the better your chances of success. Your best option is to contact a representative of the program to help you with the application or proposal. It can give you the best chance of being approved.

### Contact:

Volunteer Manitoba and ask about the Proposal Review Service 204-477-5180 ext. 224 in Winnipeg; toll free 1-888-922-4545 ext. 224; e-mail [vmtraining@mts.net](mailto:vmtraining@mts.net)

### Review Online:

- [Volunteer Manitoba: Training on Proposal Writing](#)

**F.15** We are familiar with various financial institutions, the differences between them and their lending practices.

Discussion:

- Yes
- No
- In progress

Aside from funding programs and grants, the two most common places to secure your financial needs are banks and credit unions. Make appointments with several to see who can offer you the best services. As with funding applications, you will need to be clear and confident about your project's goals to give yourself the greatest chance at securing a loan. While a full business plan may or may not be necessary, preparing some basic financial projections will show the lenders that you are serious about your needs and have done your due diligence.

### General Operating Income

**F.16** We are familiar with other creative sources of funding and know how to use them to provide financial assistance with our historic place.

Discussion:

- Yes
- No
- In progress

Sources of financial support, such as planned giving, can provide alternate sources of revenue.

#### Review Online:

- [Charity Village](#)
- [Canadian Association of Gift Planners](#)

**F.17** We have secured corporate and/or private sponsors to assist with financial support.

Discussion:

- Yes
- No
- In progress

Where you think there might be a good fit, ask corporate and private sponsors to help with your financial, maintenance, operational, or marketing needs. In exchange for some promotional activities (ex: signs, recognition in print or other media), sometimes corporate and/or private sponsors are willing to offer materials, labour, or expertise.



**F.18** We use all or part of the historic place to generate revenues.

Discussion:

- Yes
- No
- In progress

Are you able to use your historic place or lease a part of it to other businesses to generate revenues, without excessively compromising its heritage value?

**F.19** We have considered other creative uses of our historic place to generate revenue if the site is not generating sufficient income in its current state.

Discussion:

- Yes
- No
- In progress

Consider creative uses of your site that maintain its integrity but can increase revenue at the same time. Depending on your location and the nature of your site, anything from retail to office space, or restaurant, to bed and breakfast, could be a viable option for consideration. Review the Adaptive Reuse Matrix on page five. Critical to the success of any of these ventures, however, is a commitment to maintain the heritage character of your site.

**F.20** We have developed tourism at our historic place and charge a fee to visitors.

Discussion:

- Yes
- No
- In progress

Tourism isn't a workable option for every heritage site, but it might be worth considering. Before committing your project to tourism, do some solid research on the potential of your idea. Discuss your goals and ideas with individuals in other communities who may have already accomplished what you are trying to do. Consider using existing heritage-based tourism activities and exploring partnerships with other businesses and communities in your area and beyond.

#### **Review Online:**

- [Canadian Tourism Commission](#)
- [Travel Manitoba](#)
- [Heritage Canada Foundation](#)



**F.21** We have secured sufficient revenue through funding, financing or other sources to offset the anticipated capital and operating expenses.

Having explored all of the options presented so far, have you secured enough funds to cover all of your anticipated capital and operating expenses? At the same time, have you identified where you can minimize your costs? If not, it's best to review and reconsider some revenue sources now before committing any further to your plan.

Discussion:

- Yes
- No
- In progress



### Section 3: Financial Implementation Plan

The following table is a template that allows you to keep track of each action item you identified in the FINANCIAL section. For every item that requires further attention, note it in the table below. Identify when you plan to complete that task (timeline), who will be primarily responsible for completing it L (Lead role), what the anticipated costs will be (cost), and any other comments you wish to add that will ensure the task is completed properly (comments).

You can then prioritize the items based on your timeline. Or alternatively indicate the priority of each item as: H= high M= medium L= low.

Item	Action Required	Timeline	Lead Role	Cost	Comments

Continued...







## APPENDIX

Hard copies of Historic Resources Branch publications can be mailed to you upon request. Contact the Historic Resources Branch for more information on available resources or to request copies.

Historic Resources Branch  
Manitoba Culture, Heritage and Tourism  
Main Floor, 213 Notre Dame Avenue  
Winnipeg, MB R3B 1N3  
T (204) 945-3844 or toll free 1-800-282-8069 ext 3844  
F (204) 948-2384  
[www.manitoba.ca/heritage](http://www.manitoba.ca/heritage)

### SECTION 1: CONDITION

Bizpal: [www.bizpal.ca](http://www.bizpal.ca)

Canadian Mortgage and Housing Corporation Your Home Your Health:  
[www.cmhc-schl.gc.ca/en/co/maho/yohoyohe/](http://www.cmhc-schl.gc.ca/en/co/maho/yohoyohe/):

City of Winnipeg – Winnipeg Police Service. Graffiti Prevention:  
[www.winnipeg.ca/police/TakeAction/graffiti\\_prev.stm](http://www.winnipeg.ca/police/TakeAction/graffiti_prev.stm)

Crime Prevention Through Environmental Design (CPTED) Guidelines:  
[www.manitoba.ca/chc/pdf/cpted\\_guidelines\\_all.pdf](http://www.manitoba.ca/chc/pdf/cpted_guidelines_all.pdf)

HRB's Heritage Building Maintenance Manual:  
[www.manitoba.ca/chc/hrb/heritage/maintenace\\_for\\_heritage\\_bldgs.pdf](http://www.manitoba.ca/chc/hrb/heritage/maintenace_for_heritage_bldgs.pdf)

HRB's Municipal Designation Is It Right For You?:  
[www.manitoba.ca/chc/hrb/heritage/designation\\_booklet\\_2008.pdf](http://www.manitoba.ca/chc/hrb/heritage/designation_booklet_2008.pdf)

HRB's Infobulletin on Preserving Heritage Buildings:  
[www.manitoba.ca/chc/pdf/02\\_preserving\\_heritage\\_bldgs.pdf](http://www.manitoba.ca/chc/pdf/02_preserving_heritage_bldgs.pdf)

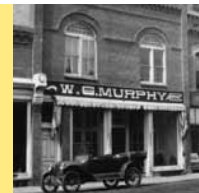
Manitoba the Health and Safety Act: [www.manitoba.ca/labour/safety](http://www.manitoba.ca/labour/safety)

NPS Preservation Brief #38 Removing Graffiti from Historic Masonry:  
[www.nps.gov/history/hps/tps/briefs/brief38.htm](http://www.nps.gov/history/hps/tps/briefs/brief38.htm)

Standards and Guidelines for the Conservation of Historic Places in Canada:  
[www.historicplaces.ca](http://www.historicplaces.ca)

Safe Work (Manitoba's Workplace Health and Safety): [www.safemanitoba.ca](http://www.safemanitoba.ca)

Workplace Safety: [www.safecanada.ca](http://www.safecanada.ca)



## SECTION 2: PEOPLE

Canadian Heritage: Promoting Volunteerism (pdf): [www.manitoba.ca/chc/pdf/ch\\_promoting\\_volunteerism.pdf](http://www.manitoba.ca/chc/pdf/ch_promoting_volunteerism.pdf)

Canadian Heritage: Publicity! How You Can Publicize Volunteerism In Your Community (pdf): [www.manitoba.ca/chc/pdf/ch\\_publicity.pdf](http://www.manitoba.ca/chc/pdf/ch_publicity.pdf)

Community Heritage Manitoba: [www.communityheritagemanitoba.ca](http://www.communityheritagemanitoba.ca)

HRB's Guide to Employing Students (pdf):  
[www.manitoba.ca/chc/heritage/employ\\_guide.pdf](http://www.manitoba.ca/chc/heritage/employ_guide.pdf)

HRB's Guide to Marketing and Promoting Heritage Organizations (pdf):  
[www.manitoba.ca/chc/hrb/info/heritage\\_guide\\_to\\_marketing.pdf](http://www.manitoba.ca/chc/hrb/info/heritage_guide_to_marketing.pdf)

HRB's Heritage Building Maintenance Manual (pdf):  
[www.manitoba.ca/chc/hrb/heritage/maintenace\\_for\\_heritage\\_bldgs.pdf](http://www.manitoba.ca/chc/hrb/heritage/maintenace_for_heritage_bldgs.pdf)

HRB's Municipal Heritage Resource Guide (pdf):  
[www.manitoba.ca/chc/hrb/munresguide.html](http://www.manitoba.ca/chc/hrb/munresguide.html)

Manitoba Youth Volunteer Opportunities Program: [www.myvop.ca](http://www.myvop.ca)

Sport Manitoba Board Self Assessment (pdf): [www.sportmanitoba.ca/downloads/PT\\_Board\\_Self\\_Assessment.pdf](http://www.sportmanitoba.ca/downloads/PT_Board_Self_Assessment.pdf)

Volunteer Manitoba: [www.volunteermanitoba.ca/newsite/contract\\_training.htm](http://www.volunteermanitoba.ca/newsite/contract_training.htm)

Volunteer Manitoba Resource Library:  
[www.volunteerwinnipeg.mb.ca/newsite/resource\\_centre.htm](http://www.volunteerwinnipeg.mb.ca/newsite/resource_centre.htm)

## SECTION 3: FINANCIAL

Canadian Association of Gift Planners: [www.cagp-acpdp.org](http://www.cagp-acpdp.org)

Canadian Fundraising & Philanthropy: [www.canadianfundraiser.com](http://www.canadianfundraiser.com)

Canadian Tourism Commission: [www.corporate.canada.travel/en/ca](http://www.corporate.canada.travel/en/ca)

Charity Village: [www.charityvillage.ca](http://www.charityvillage.ca)

CHT Heritage Grants Program: [www.manitoba.ca/chc/grants/heritage\\_grants.html](http://www.manitoba.ca/chc/grants/heritage_grants.html)

Face to Face: How to Get Bigger Donations from Very Generous People (pdf):  
[www.manitoba.ca/chc/pdf/ch\\_how\\_to\\_get\\_donations.pdf](http://www.manitoba.ca/chc/pdf/ch_how_to_get_donations.pdf)



Fundraising Ideas that Work for Grass Roots Groups (pdf):

[www.manitoba.ca/chc/pdf/ch\\_fundraising\\_ideas.pdf](http://www.manitoba.ca/chc/pdf/ch_fundraising_ideas.pdf)

Guide to Special Event Fund Raising (pdf):

[www.manitoba.ca/chc/pdf/ch\\_guide\\_event\\_fund\\_raising.pdf](http://www.manitoba.ca/chc/pdf/ch_guide_event_fund_raising.pdf)

Heritage Canada Foundation: <http://www.advocacyaction.org>

How to Estimate the Economic Contribution of Volunteer Work (pdf):

[www.manitoba.ca/chc/pdf/ch\\_estimate\\_economic\\_contribution.pdf](http://www.manitoba.ca/chc/pdf/ch_estimate_economic_contribution.pdf)

HRB's Heritage Building Maintenance Manual (pdf):

[www.manitoba.ca/chc/hrb/heritage/maintenace\\_for\\_heritage\\_bldgs.pdf](http://www.manitoba.ca/chc/hrb/heritage/maintenace_for_heritage_bldgs.pdf)

HRB's Municipal Heritage Resource Guide (pdf):

[www.manitoba.ca/chc/hrb/munresguide.html](http://www.manitoba.ca/chc/hrb/munresguide.html)

Insurance Bureau of Canada's: Insuring Old Homes in Nova Scotia (pdf):

[www.manitoba.ca/chc/pdf/heritage\\_home-ns.pdf](http://www.manitoba.ca/chc/pdf/heritage_home-ns.pdf)

Interactive Business Planner from the Canada-Manitoba Business Service Centre:

[www.canadabusiness.ca](http://www.canadabusiness.ca)

Travel Manitoba: [www.travelmanitoba.com](http://www.travelmanitoba.com)

Volunteer Manitoba: [www.volunteermanitoba.ca](http://www.volunteermanitoba.ca)

Volunteer Manitoba Resource Library:

[www.volunteerwinnipeg.mb.ca/newsite/resource\\_centre.htm](http://www.volunteerwinnipeg.mb.ca/newsite/resource_centre.htm)







