



Heritage BC



Heritage BC Strategic Plan 2016 - 2018

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## EXECUTIVE SUMMARY

The purpose of this plan is to update the Dogwood Heritage Society of British Columbia (“Heritage BC”) Strategic Plan 2012-2015, which charted a renewed direction for Heritage BC complementary to the Provincial Heritage Strategy and provincial heritage program.

The plan identifies three goals for Heritage BC

1. Ensure that Heritage BC is financially secure and independent
2. Be the collective voice of heritage in British Columbia
3. Foster a culture that embraces the conservation of British Columbia’s heritage.

The plan carries forward the path for the renewal of community-based heritage conservation in British Columbia with an updated action plan through to 2018.



# INTRODUCTION

The purpose of this plan is to update the Heritage Society of British Columbia (“Heritage BC”) Strategic Plan 2012-2015, which charted a renewed direction for Heritage BC that is complementary to the Provincial Heritage Strategy and provincial heritage program.

Heritage conservation ensures that the legacy of the past will be preserved for the future. Since 1977, British Columbia has evolved a distinctive, community-based approach to heritage conservation. Provincial agencies, including the provincial government, Heritage BC and the Heritage Legacy Fund, have worked in close cooperation to provide a foundation of support to enable BC communities to discover, understand and conserve their heritage.

In response to a crisis in support and funding, Heritage BC issued “A Call to Renew British Columbia’s Heritage Program” in 2010. This initiative called for five steps to renew BC’s once-vital response to community conservation:

- Adopt the Provincial Heritage Strategy
- Restore the Heritage Branch Budget
- Resolve the Heritage Properties Question
- Restore Community Support
- Invest in the Heritage Legacy Fund

The Province took steps to secure the Heritage Properties and, in February 2013, allocated one-time funding for Heritage BC to transition to a leadership role in providing services and encouragement to local government and community heritage organizations. Following talks with the Heritage Legacy Fund Society of BC, this organization was put in a holding pattern in 2013 and Heritage BC became manager for the Heritage Legacy Fund and delivery of grants.

As part of its ongoing renewal, Heritage BC must continue to respond to changing conditions. For thirty years, Heritage BC relied on a close and mutually beneficial working relationship with the provincial government. This relationship must now include a strong, independent and financially secure Heritage BC working in tandem with government toward shared goals on behalf of all British Columbians.

## HOW WE WILL ACCOMPLISH OUR GOALS

In order to achieve the goals of the Heritage Strategy, Heritage BC will:

### **Build a Strong and Independent Heritage BC**

A strong and responsive structure has been developed, which will ensure that Heritage BC can continue to play a key role in the delivery of BC's heritage programs.

### **Work in Tandem with the Provincial Heritage Strategy**

The Provincial Heritage Branch and Heritage BC both provide distinctive and essential services to local government and communities in support of a mutual goal of community-based heritage conservation.

### **Increase the Heritage Legacy Fund**

The Heritage Legacy Fund has supported community-based heritage conservation projects for 11 years, and since 2009 has underwritten a broad range of services to communities through financial assistance. To secure these services and investments as a permanent foundation of a thriving provincial heritage program, there must be an increase in the Fund endowment.



## PROVINCE-WIDE ADVANTAGES

Heritage BC is uniquely positioned to assist with the challenges that BC's communities are facing, while enabling the planning and development of sustainable communities, including their local economies.

The continued development of a strong and independent Heritage BC, in conjunction with an enhanced Heritage Legacy Fund, supports the broader goals of the Province of BC, including:

- Strengthen communities and families through support for British Columbia's unique cultural identity
- Support economic investment in BC's heritage resource sector
- Enhance job creation initiatives in BC's growing cultural sector
- Promote innovation in planning BC's diverse communities through revitalization of local heritage
- Achieve BC's climate change and energy targets through the retention and appropriate reuse of existing building stock
- Support BC's affordable housing initiatives through adaptive reuse of existing buildings
- Build capacity for BC's cultural tourism initiatives

Further, there is a commitment to speak on behalf of British Columbians, and to empower communities in their efforts to conserve irreplaceable heritage resources across the province.



## THE STRATEGIC PLAN

Heritage BC was incorporated in 1981 as a non-profit, province-wide umbrella organization. Through social media, publications, events, education programs and Heritage Legacy Fund grants, Heritage BC promotes and assists community-based heritage conservation. On behalf of its members and all British Columbians, Heritage BC advocates for (the conservation of heritage) resources throughout the province.

This updated Strategic Plan reaffirms the vision, mission and values of Heritage BC, carries forward the 2012-2015 broad goals and objectives for the society, and refreshes the actions to achieve these goals. It provides a clear picture of Heritage BC's purpose and direction to members, supporters and others, and a guide for directors and staff.

## HERITAGE BC: CONNECTING COMMUNITIES

Founded to provide leadership and support for heritage conservation at the grassroots level, in three decades Heritage BC has established strong and effective partnerships with communities to conserve heritage in ways that complement our provincial programs.

The establishment of Heritage BC was encouraged and facilitated by the provincial government. Emerging at the same time with many goals in common, the provincial heritage program and Heritage BC have worked together closely for almost 35 years. Between 1989 and 2009 the provincial government contributed core funding to Heritage BC for continuous, reliable service to our members, and other community organizations.

When Heritage BC began the path to renewal in 2012, the majority of Heritage BC's member groups were local heritage associations, community heritage commissions and local governments. These form an essential part of the community-based approach, and Heritage BC continues to develop unique programs and services to meet their needs.

Conferences bring members together to learn, share experiences and renew their collective sense of purpose. Workshops and courses deliver information and teach skills. A newsletter, website and social media provide information, discussion and analysis of issues, and a provincial perspective. Special events such as Heritage Week create unique opportunities for celebrations, and the society's award program honours achievement and community service.

Heritage BC also takes its message to the public. The awards program publicizes heritage projects and achievements. The annual Heritage Week theme features a distinctive aspect of British Columbia's history. Heritage BC Quarterly newsletter is widely circulated multiple times a year.

Heritage BC is governed by an elected board that sets policy and strategic direction. The Society maintains a staff of three full-time employees.

## VISION

Heritage BC strengthens the identity and pride of our diverse communities.

## MISSION

To provide leadership for sustainable conservation of British Columbia's unique cultural heritage. We work collaboratively with community, government and private sector partners to create a strong and positive future for heritage conservation in British Columbia.

## VALUES

Heritage BC is guided in its vision, mission and activities through a set of values:

### **Conservation:**

Stewardship of irreplaceable heritage is important to British Columbians.

### **Public Interest:**

The conservation of heritage is a public good with benefits for present and future generations.

### **Innovative Development:**

Heritage resources are an essential component of sustainable development in BC communities.

### **Knowledge:**

Awareness, education and understanding of the broad range of our heritage values are the foundation for successful conservation.

### **Service Commitment:**

We are dedicated to serving our members and their communities.

## GOALS

Our Action Plan is based on the following priority Goals:

- Ensure that Heritage BC is financially secure and independent.
- Be the collective voice of heritage in British Columbia.
- Foster a culture that embraces the conservation of British Columbia's heritage.

# ACTION PLAN

The Heritage BC Action Plan is based on the following priority Goals:

## GOAL 1:

Ensure that Heritage BC is financially secure and independent.

## GOAL 2:

Be the collective voice of heritage in British Columbia.

## GOAL 3:

Foster a culture that embraces the conservation of British Columbia's heritage.



## GOAL 1

Ensure that Heritage BC is financially secure and independent.

### 1.1 Organizational Transition

- Diversify and increase revenue sources through fundraising, social enterprise, fee-for-services, and Endowment Fund development.
- Continue to build Board members' strength in areas of finance and fund development.

### 1.2 Program Cost Recovery

- Administer all programs on a cost-recovery basis.

### 1.3 Increase Revenue from Existing Sources

- Increase and diversify membership through implementation of the approved Membership Plan.

## GOAL 2

Be the collective voice of heritage in British Columbia.

### 2.1 Outreach to Other Communities

- Engage all government including First Nations.
- Grow board with broader representation across BC.

### 2.2 Build a Strong Relationship with Relevant Sectors and Provincial Associations

- Improve relations with and offer services to:
- Real estate sales, builders, and developers including the Urban Development Institute
- Municipal officers such as building inspectors;
- Union of BC Municipalities
- Professional associations including PIBC and AIBC.

### 2.3 Support a National Network of Heritage Advocacy

- Continue to work with and support national and provincial heritage organizations across Canada.

## 2.4 Strengthen the Provincial Heritage Community

- Build meaningful and authentic relationships with diverse cultures.
- Engage and stay connected to individuals, organizations and local governments to provide a powerful forum for community heritage.

## 2.5 Improve Communications and Enhance Relationship with Media

- Develop a marketing and communications plan.
- Review and evaluate the print format and distribution of the newsletter.
- Build Heritage Week to become a significant annual program in British Columbia.

## 2.6 Establish Clear Advocacy Agenda and Profile

- Distinguish Heritage BC's identity, profile, brand, program and services from other heritage organizations.
- Offer information and analysis on heritage trends and issues.

## 2.7 Expand the School Program

- Promote heritage education for school ages up to Grade 12.
- Promote training and education in heritage conservation in post-secondary institutions.

## GOAL 3

Foster a culture that embraces the conservation of British Columbia's heritage.

### 3.1 Enhance Information Services

- Produce web-based toolkits and information series.

### 3.2 Improve Services to Local Government

- Add Local Government and Heritage section to website.
- Increase membership.
- Participate in UBCM annual conference.

### 3.3 Provide Funding for Community Heritage

- Manage the Heritage Legacy Fund, and administer grants.
- Identify other sources of funding and advocate for increased funding for heritage initiatives.

### 3.4 Celebrate BC Heritage

- Develop a program to celebrate Heritage BC's 35th anniversary.
- Deliver a project during Canada's 150th anniversary celebration.

| Plan Objectives  | 2016 Actions   | 2017 Actions   | 2018 Actions   |
|--|--|--|--|
| <b>I.1 Organizational Transition</b>   |  |  |  |
| Diversify revenue streams through fundraising, social enterprise, fee-for-services and Endowment Fund development. | <p>Develop a fundraising plan – including Endowment Fund development - and add goals and targets to annual budget.</p> <p>Explore feasible options for social enterprise (e.g. property management). Develop a plan for a minimum of one venture.</p> <p>Continue fee-for-services and add target(s) to annual budget.</p> | <p>Implement the fundraising plan and monitor / track results.</p> <p>Implement the social enterprise plan and monitor / track results.</p> <p>Continue fee-for-services and add target(s) to annual budget.</p> | <p>Evaluate fundraising plan, and revise for next year, as needed.</p> <p>Evaluate the social enterprise plan, and revise for next year, as needed.</p> <p>Continue fee-for-services and add target(s) to annual budget.</p> |
| Continue to build Board members' strength in areas of finance and fund development.                                | <p>Review financial policies and revise, as needed.</p> <p>Build Board members' capacity in finance &amp; fund development, and monitor/evaluate successes.</p>  | <p>Build Board members' capacity in finance &amp; fund development, and monitor/evaluate successes.</p> <p>Secure a Chartered Accountant as a Board member at AGM</p>  | <p>Build Board members' capacity in finance &amp; fund development, and monitor/evaluate successes.</p>  |
| <b>I.2 Program Cost Recovery</b>   |  |  |  |
| Administer all programs on a cost-recovery basis   | <p>Develop and approve a business case model to evaluate existing and new programs/projects and add cost recovery goals and targets to the annual budget.</p>  | <p>Implement the business case model and budget reporting, and monitor / track results.</p>  | <p>Evaluate business case model and budget report method, and revise for next year, as needed.</p>   |

| Plan Objectives  | 2016 Actions   | 2017 Actions   | 2018 Actions   |
|--|--|--|--|
| <b>1.3 Increase Revenue from Existing Sources</b>  |  |  |  |
| Increase and diversify Heritage BC membership, as per the approved Membership Plan             | Launch membership drive and increase membership by 5% based on December 31/2015.   | Increase membership by 5% based on December 31/2016.   | Increase membership by 5% based on December 31/2017.   |
| <b>2.1 Outreach to Communities</b>   |  |  |  |
| Engage all government including First Nations  | Develop an outreach plan.  | Implement an outreach plan, and monitor/track outcomes.  | Evaluate outreach plan, and revise for next year, as needed.   |
| Grow Board with broader representation across BC   | Increase Board to minimum of ten (10) members at AGM.  | Increase Board to minimum of eleven (11) members at AGM.   | Increase Board to minimum of twelve (12) members at AGM.   |
| <b>2.2 Build a Stronger Relationship with Relevant Sectors and Provincial Associations</b>     |  |  |  |
| Improve relations and offer services   | Continue to work with these sectors: (1) real estate sales, builders, and developers including the Urban Development Institute; (2) municipal officers such as building inspectors; (3) Union of BC Municipalities; (4) professional associations including PIBC and AIBC. | Continue to work with these sectors: (1) real estate sales, builders, and developers including the Urban Development Institute; (2) municipal officers such as building inspectors; (3) Union of BC Municipalities; (4) professional associations including PIBC and AIBC. | Continue to work with these sectors: (1) real estate sales, builders, and developers including the Urban Development Institute; (2) municipal officers such as building inspectors; (3) Union of BC Municipalities; (4) professional associations including PIBC and AIBC. |
| <b>2.3 Support a National Network of Heritage Advocacy</b>                                     |  |  |  |
| Continue to work with and support national and provincial heritage organizations across Canada | Ongoing  | Ongoing  | Ongoing  |
| <b>2.4 Strengthen the Provincial Heritage Community</b>  |  |  |  |
| Build meaningful and authentic relationships with diverse cultures                             | Ongoing  | Ongoing  | Ongoing  |

| Plan Objectives   | 2016 Actions  | 2017 Actions   | 2018 Actions   |
|---|---|--|--|
| Engage and stay connected to individuals, organizations and local governments to provide a powerful forum for community heritage                        | Ongoing   | Ongoing  | Ongoing  |
| <b>2.5 Improve Communications and Enhance Relationship with Media</b>   |   |  |  |
| Develop a marketing and communications plan   | Develop the marketing and communications plan including innovative uses of social media, and add goals and targets to the annual budget.  | Implement marketing and communications plan and monitor / track the results.   | Evaluate marketing and communications plan, and revise for next year, as needed.   |
| Review and evaluate the print format and distribution of the newsletter. Build Heritage Week to become a significant annual program in British Columbia | Undertake cost-benefit analysis of the print distribution. Engage Heritage BC network in the decision process through a membership survey. Marketing and communications plan to include decisions about the newsletter. Address media relations as part of the marketing and communications plan. | Implement new newsletter and distribution changes, if any, and monitor/ track outcomes.                                  | Evaluate the newsletter format and distribution, and revise for next year, as needed.                                    |
| Plan Objectives   | 2016 Actions  | 2017 Actions   | 2018 Actions   |
| <b>2.6 Establish Clear Advocacy Agenda and Profile</b>  |   |  |  |
| Distinguish Heritage BC's identity, profile, brand, program and services from other heritage organizations.   | Review and renew the existing Heritage BC advocacy policy.  | Consider options for enhancing the Heritage BC profile / brand.  |  |
| Offer information and analysis on heritage trends and issues  | Continue to communicate about heritage trends and issues through social media and other channels such as the newsletter.  | Continue to communicate about heritage trends and issues through social media and other channels such as the newsletter. | Continue to communicate about heritage trends and issues through social media and other channels such as the newsletter. |

**2.6 Establish Clear Advocacy Agenda and Profile 2.7 Expand the School Program**

|  |   |                             |                             |
|--|---|-----------------------------|-----------------------------|
| Promote heritage education for school ages up to Grade 12                              | Consider working with BC Heritage Fairs on programs. Seek avenues to renew the Stops of Interest program. | Continue to explore options | Continue to explore options |
| Promote training and education in heritage conservation in post-secondary institutions | Explore options to work with technical schools, universities and various research agencies                | Continue to explore options | Continue to explore options |

**3.1 Enhance Information Services**

|   |   |  |   |
|---|---|--|---|
| Produce web-based toolkits and information series | Undertake a gap analysis and needs assessment of currently offered programs. Develop a toolkits and information series plan, and add it to annual budget. | Implement the toolkits and information series plan, and monitor / evaluate outcomes. | Evaluate the toolkits and information series plan, and revise for next year, as needed. |
|---|---|--|---|

|                        |                     |                     |                     |
|------------------------|---------------------|---------------------|---------------------|
| <b>Plan Objectives</b> | <b>2016 Actions</b> | <b>2017 Actions</b> | <b>2018 Actions</b> |
|------------------------|---------------------|---------------------|---------------------|

**3.2 Improve Services to Local Government**

|  |  |  |  |
|--|--|--|--|
| Add Local Government and Heritage section to website | Update the relevant information and services via the website.                        | Offer up-to-date information and services via the website.                           | Offer up-to-date information and services via the website.                           |
| Increase membership                                  | Reach or exceed annual targets for local government in the approved Membership Plan. | Reach or exceed annual targets for local government in the approved Membership Plan. | Reach or exceed annual targets for local government in the approved Membership Plan. |
| Participate in UBCM annual conference                | Attend and allocate costs in budget  | Work with UBCM to address heritage issues in the program.                            | Work with UBCM to address heritage issues in the program.                            |

| <b>3.3 Provide Funding for Community Heritage</b>   |  |  |         |
|---|--|--|---------|
| Manage the Heritage Legacy Fund, and administer grants.                                       | Ongoing  | Ongoing  | Ongoing |
| Identify other sources of funding and advocate for increased funding for heritage initiatives | Ongoing  | Ongoing  | Ongoing |
| <b>3.4 Celebrate BC Heritage</b>  |  |  |         |
| Develop a program to celebrate Heritage BC's 35th anniversary                                 | Develop and launch a legacy program across BC.                                     |  |         |
| Deliver a project for Canada's 150th anniversary celebrations                                 | Explore funding options. Build on Heritage BC legacy program to develop a project. | Launch Heritage BC project as part of nationwide celebrations. |         |