A COMPARISON OF CHARITABLE TRUSTS

IN THE FIELD OF HISTORIC PRESERVATION

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The undersigned certify that they have read, and recommend to the Faculty of Environmental Design for acceptance, a Master's Degree Project entitled A Comparison of Charitable Trusts in the Field of Historic Preservation submitted by Sara (Sally) Jennings in partial fulfilment of the requirements for the degree of Master of Environmental Design.

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ABSTRACT

This study compares a variety of charitable trusts (or non-profit organisations) working primarily in the field of historic preservation. The trusts were chosen from three countries (Canada, the United States and Britain) for their variety of mandate and size and operations. This comparison may lead the way to the formation of more effective trusts in their continuing evolution.

Trusts in historic preservation have been in existence for the last hundred years, and it is useful to examine the trusts in historical perspective. Trends in preservation which may influence the future of trusts are noted.

The purpose of this study is to compare and analyse the trusts, describe elements of good practice from current trusts (noting the characteristics of trusts that are effective) and describe the phases to set up a trust. Recommendations cover the kind of trust that is successful and the structure of the trust.

The comments of members and observers of trusts in the field of historic preservation provide the basis for the tools of evaluation. Their main concerns (management practice, funding, community involvement and project identification) are used to examine the trusts.

As trusts are set up with a mandate specific to that trust, each organisation studied is unique. However, their similarities and differences show that some factors for success can be established and some guidelines provided for those involved in a trust organisation.

Key words: historical preservation, conservation, charitable trust, non-profit organisation

CONTENTS

CHAPTER 1: INTRODUCTION

The impetus for preservation, which provides the basis for this paper, began to be felt approximately a hundred years ago in each of the three countries studied: Canada, the United States and Britain. An increasing interest in preservation grew from various factors such as wider education, more frequent travel, the encroachment of cities on the countryside, and a desire to preserve wilderness.

In each country, the first decisive move was to protect countryside. The United States established Yellowstone National Park in 1872. The National Park Service was created in 1916. The Canadian national parks system began in 1885 with the formation of Banff National Park. Today the parks system includes historic sites. In Britain, preservation of landscape was undertaken by private initiative with the founding of the National Trust for Places of Historic Interest and Natural Beauty in 1895. Within a year, the first historic building had been purchased. In the United States the National Trust for Historic Preservation was founded in 1947.

During the last hundred years, the trust movement has expanded to include concern for buildings of all kinds and all periods. At first, interest lay in preserving romantically-perceived medieval buildings, but this has widened and today interest is shown in preserving well-designed buildings only ten years old as good examples of their type. The ideas that limited preservation to monumental buildings built by the state or the aristocracy have changed to realisation that history is just as satisfactorily evoked by cottages and mills. A wider view of history and lifestyles is now appreciated, and the trust movement reflects these changes.

The numbers of people involved with historic preservation have increased enormously during the hundred years of trust operation. In Britain, the National Trust has over two million members, while the Civic Trust has Amenity Societies all over the country with over 300,000 members. More specific figures indicate the audience for live arts in Britain in 1983/4 was estimated at thirty-nine million, while that for historic houses reached forty-eight million, and that for museums and galleries was fifty-eight million (Hewison, 1987:27). In the United States, the National Trust for Historic Preservation has over 250,000 members, and in a society where twenty per cent of the population moves annually, preservation is valued for giving 'a sense of orientation to our society, using structures and objects of the past to establish values of time and place' (Maddex, 1983:193). Canada has 850 preservation societies and there are over 20,000 members of Heritage Canada.

The history of preservation will be discussed in Chapter 2, together with trends which may influence the future. Chapter 3 describes the case studies. Description of the preservation background in each country will precede the case studies of that country. In Chapter 4, the important characteristics of a successful trust are noted and recommendations made. Evaluation methods, further details of the case studies, and setting-up procedure for a new trust are contained in three appendices.

The object of this study is to compare the trusts from three countries (Canada, the United States and Britain), created in the last thirty-five years, to identify some general factors of good practice. The characteristics of trusts as charities and educators will be discussed as central to their role. The trusts will also be viewed in their historical context so that the continual change and modification of trusts is seen as part of their strength. Comments on trends and on the future are included so that a broad perspective is achieved.

The resulting analysis of good practice may then be applied to current or emerging trusts and adjustments may be made to increase their success in historic preservation. Comparison of trusts may stimulate further efforts in preservation.

The recommendations describe the elements of a successful trust under the headings: organisation, finances and tools.

The term 'trust' in Europe is the equivalent of 'non-profit organisation' in North America. Both terms refer to an organisation registered as a charitable body with an aim to benefit society. In this study, trusts concerned primarily with historic preservation are the focus.

Trusts can be defined as: independent, non-profit organisations which are formed in a spirit of renewal or restoration for the benefit of the public. Public, private and voluntary sectors are frequently brought together to take action. Emphasis is put on local involvement. Funding is based on a wide range of resources available because of the politically neutral nature of the organisation.

Although there are many different types of trust, in 'Creating Development Trusts' it is suggested by Warburton and Wilcox that some of the key characteristics of trusts are:

- They initiate action; they get things done.
- They are independent; not part of the local authority nor under the control of any other single private or voluntary organisation.
- They encourage substantial community involvement.
- They bring together the public, private and voluntary sectors, and the local community, in a positive partnership.
- They have multiple objectives including social benefit, environmental improvement, economic development and community development.
- They are concerned with area improvement.
- They undertake physical development of sites and buildings.
- Trusts are not-for-profit organisations; they primarily work for social benefit.
- Trusts aim to generate revenue and cross-subsidise from commercially viable activities to non-profit-making schemes.
- Trusts package resources including grants, loans, effort, enthusiasm, skills and energy from organisations and individuals.

(Warburton & Wilcox, 1988:2-3)

Trusts will be examined and compared to extract useful principles to aid the expansion of the historic trust movement.

METHODOLOGY

For the case studies, methods of data gathering and evaluation have been based on the qualitative naturalist approach as well as the quantitative scientific one. The naturalistic approach is described as 'the study of behavioural phenomena in situ and using methods drawn from ethnography, anthropology, and sociological field studies' (Guba & Lincoln, 1981:xi).

Initial quantitative information was requested from the trusts as a base for analysis and judgement.

A balance was created in the case studies by a brief quantitative description of the trust under standard headings, followed by a more free-flowing description and commentary. 'The complete act of evaluation ...involves both description and judgement' (Guba & Lincoln, 1981:380).

Information was obtained directly from the trusts. For the trusts chosen outside Alberta, a letter was sent requesting information on their credo, mandate, focus, workforce, legal description, date of formation, origin, structure, location, subgroups, spin-off groups, projects and programmes, static displays, partnerships, role in education, communication, publications, awards given, legislation and funding sources.

For trusts in Calgary, personal contact (interview) was made to gather this same information.

Information received from the individual trusts included general information designed for the public on the work of the trust, copies of the founding legislation in some cases, annual and budget reports, conference reports, publications by the trust, and newsletters. The amount and type of information from each trust varied. Information from some local trusts in Alberta was modified and enlarged upon by personal comment (in interview) from a director of the trust.

The information was compared and analysed category by category.

The promotional information gathered directly from the trust may show a bias towards painting a successful picture of the trust's work. It is descriptive and not analytical. Balanced against this, however, are the facts and figures of some annual reports together with first-hand information on local trusts' work. Magazine articles also contribute to the balanced comment. A study of the projects completed by each trust gives an indication of its focus, its strengths and the direction in which it is moving.

LITERATURE REVIEW

Literature in the field of historic preservation and conservation is extensive, but it generally deals with such problems as 'why do we preserve?' Specific information on trusts is limited to booklets, reports and magazines.

The earliest publication in this field was found to be Historic Preservation in Foreign Countries by Anthony Dale and Margaret T. Will (1982 and 1984). The two books describe in broad perspective both the historical background and the state of preservation in eight European countries as a tool for comparison with the United States. Both books detail work by voluntary and private organisations in each country, as a facet of the preservation scene.

Within the last ten years, comparison of trusts working in preservation has been made in a Survey of Trusts by the Polytechnic of Central London (School of Urban Development and Planning). Unfortunately it has proved impossible to obtain this survey. However, the Department of the Environment (UK) produced Creating Development Trusts (fifteen case studies) in 1988. This publication refers only to trusts within Britain, but the material is up-to-date and extensively researched. It provides the basis for evaluation and analysis in this Master's Degree Project. Another useful information source is Breaking New Ground, the report of the Operation Groundwork Conference in 1988. This document contains Professor Noel Boaden's comments on Groundwork which are quoted in the discussion of criteria. Other recent commentaries have been found in planning magazines, such as the Town and Country Planning magazine and Regeneration (Civic Trust) which contain a wide variety of comments from people working in the trust field.

Major institutions such as the National Trust (UK) and the National Trust for Historic Preservation (USA) both publish extensively, but the material is usually information for the general public, rather than information on trust work.

So the literature on the comparison of trusts is minimal. The few workbooks, conference reports and surveys mentioned above are the only books located which contain comparisons and comments on trusts. This Master's Degree Project has used the format from Creating Development Trusts to provide a framework for the case studies, though a theoretical framework was not present and criteria for analysis was not explicit. Breaking New Ground, Regeneration and the Town and Country Planning magazine provide current commentary on trust work, which was useful.

CHAPTER 2: PRESERVATION - PAST, PRESENT AND FUTURE

INTRODUCTION

In this chapter the change of attitudes towards preservation, providing the basis for the trust phenomenon, will be noted from Ancient Greece to the present day. Reasons for these changes will be suggested together with speculation on the future based on existing trends.

THE GROWTH OF THE PRESERVATION ETHIC

Antiquity

Four hundred years before Christ, Sophocles said, 'A wise man anticipates what the future will bring from observing the experiences of the past.'

Three hundred years later, Cicero wrote that 'History is the witness that testifies to the passing of time; it illuminates reality, vitalises memory, provides guidance in daily life, and brings us tidings of antiquity' (De Oratore II, 36).

The study of history has been achieved largely through written records. Buildings were more often looted for their building materials, although there has been random preservation of monumental, often religious, buildings. For example, in Ancient Greece, the Temple of Hera had its wooden columns gradually replaced with stone. Pausanias, in the second century A.D. noted several wooden columns remaining. In

Athens, buildings were regularly moved to the Agora in order to preserve them.

The Renaissance

The study of classical art and architecture during the Renaissance indicates a search for values unchanged by time (such as the classical principles of architecture) and the desire to enrich one's culture by learning from a 'Golden Age'. A sense of history grew, leading to scholarship and a more critical preoccupation with historical change. This, in turn, led to more accurate study of original and authentic sources which were then valued more highly, and so preserved.

The first piece of preservation legislation in modern times was formulated by the Pope to control the destruction of classical Rome in the fifteenth century (Maddex, 1983:171-2).

The Sixteenth and Seventeenth Centuries

During the 16-17th centuries, an appeal to reason and the removal of superstition and sentiment created a different viewpoint. Emphasis was increasingly placed on the importance of an accurate study of the past. Original and authentic sources were used as references. The discipline of archaeology began to develop. Research became a stimulus to preservation, both of written and built material. The intrinsic value of architectural elements was now considered over their moral, spiritual or practical significance (Lowenthal & Binney, 1981:26).

Sweden was the first country to adopt preservation codes. In 1630, a Director General of Antiquities was appointed and in 1666, ancient monuments were protected by law (Maddex, 1983:177), (Lowenthal & Binney, 1981:24).

The Eighteenth and Nineteenth Centuries

By the eighteenth century, several countries in Europe had preservation codes. In the early nineteenth century, Denmark, some German states, Prussia, France and Greece were setting up commissions and systematic measures for preservation. In 1837, Britain introduced a bill for the Preservation of Ancient Monuments. By the end of the century, preservation measures were well in place, though the Ancient Monuments bill had reappeared so many times in the British parliament that it became known as the 'monumentally ancient bill' as members discussed the rights of the property owner (Lowenthal & Binney, 1981:29).

The destruction of the French Revolution and other revolutionary wars in Europe strengthened the study of history and it was generally considered that history was the only method by which all human phenomena could be understood (Lowenthal & Binney, 1981:27). In the USA, the Civil War, as well as disasters like the Chicago Fire and the San Francisco earthquake, stimulated concern for preservation. Relics of the past were seen to create the national characteristics of the present and so were given greater importance by the general public.

Education and leisure were increasingly available to a wider public in the eighteenth and nineteenth centuries. This resulted in the popularisation of an interest in the past, and increased tourism by better-informed travellers (Lowenthal & Binney, 1981:25). There was a growing number of books available on historical topics, a greater number of museums were being built, and historical societies were being formed. The foundations of the trust movement were put in place at this time. These trends have been accelerated by increased prosperity and by the media in the twentieth century.

The Twentieth Century

The trend toward greater leisure and more frequent travel has continued in the 20th century. Education has broadened to include not only books, but movies, television and computers. Museums, heritage villages and historical societies abound. There is a new awareness of individuality, history and culture, and a desire to have tangible reminders of what has shaped the individual. The pace of technological and social change has often led to a desire for reminders of a past that is perceived as more stable. Personal mobility and greater longevity, witnessing greater change, are important factors in changing attitudes (Lowenthal & Binney, 1981:19 & 216). In Britain, a dislike of modern architecture and a pessimism about the future have encouraged the growth of nostalgia for the past, from monumental to everyday objects of all eras (Hewison, 1987:45-7).

An example of nostalgia and the cynicism regarding motives for change is expressed in this poem by Martyn Skinner, a contemporary and friend of Sir John Betjeman (Poet Laureate 1972-1984).

> Old Regent Street, did war dismantle that?
> War, was it war that laid Adelphi flat,
> Along the river-front on arches borne,
> And from them by some huge explosion torn?
> Or was it a softer sound the terrace shook,
> The sound a cheque makes as it leaves its book?
>
> (Letters to Malaya, 1947)

Sir John Betjeman himself was a passionate critic of modern architecture and town planning. One of his own comments was, 'Come friendly bombs, and fall on Slough. It isn't fit for humans now.'

Colin Ward notes 'an enormous popular interest in history' in Britain in 1995. In reviewing 'Theatres of Memory: Past and Present in Contemporary Culture' by Raphael Samuel, he lists one weekend's programmes on one television channel to illustrate this, notes the museum boom, interest in graphic material (old photographs and postcards), people researching their ancestors and the popularity of costume dramas. He concludes, 'Each generation creates its own image of the past' (Ward, 1995:68). This popular interest can also be seen in North America.

Although there have been preservation initiatives throughout history, it was not until the following two concepts became common that the modern concern for preservation in Britain was established:

- The growth of the view that the preservation of ancient monuments should be ensured deliberately rather than left to chance.
- The extension of this view to a large enough sector of influential opinion in a country for this view to be applied in practice (Lowenthal & Binney, 1981:23).

The extension of the preservation ethic to the public, which has occurred in all three countries under study, made possible the formation of trusts and the recording of old buildings and archaeological sites, management of their preservation, legislation for protection, and public ownership. These activities indicate systematic preservation. This awareness is generally a nineteenth and twentieth century phenomenon. In 1819, what may be considered the first example of modern legislation (an edict by Cardinal Pacca for the protection of cultural heritage) was passed in the papal states (Maddex, 1983:178). By the nineteenth century, policies for systematic preservation had been instigated throughout Europe (Lowenthal & Binney, 1981:24). The Parks system (1872 in the U.S.A. and 1885 in Canada) began the process of preservation in North America.

Beginning with the formation of the National Trust in Britain in 1895 by three individuals, private societies have proliferated in Britain, Canada and the United States. There are now approximately one hundred building preservation societies in Britain and 850 preservation societies in Canada. The National Trust (UK) has two million members, the National Trust (USA) 250,000 members and Heritage Canada has over 20,000 members.

Municipal and state initiatives in preservation have also become increasingly common in each country. As government controls (in social welfare, education and health) were accepted earlier this century, attitudes changed. The rights of the individual as property owner, always a problem in preservation, were often seen to be less important than preservation of national culture.

Now the pendulum is swinging away from government intervention to privatisation in Europe and North America, in many fields previously controlled by government. The precedents that trusts have set in the last century will, it is hoped, provide the basis for preservation to continue. Indeed, private organisations such as trusts will need to play an even larger role as less government funding is available. This situation may be seen as providing more opportunities for trust work.

Local participation in trusts over the last thirty years has led to smaller projects and more integrated projects, such as small-town revitalisation and main street programmes. As more people participate, better education in this field is growing, combined with management skills and knowledge of preservation techniques. An example of local enthusiasm is described by Stelman Flynn, President of the Labrador Straits Historical Development Corporation, when he started the Heritage Regions Project in 1990. 'We had expected 200 to 300 people to attend, but nearly 40% of the population - 850 people - showed up! It was a truly remarkable start to what I believe was a very successful project' (Flynn, 1995:18-19).

As people become more interested in planning and preservation and how it affects daily life, they are insisting on preserving not only the building, but the context. There are now, for example, some 8,000 conservation areas in Britain, created in the last thirty years (Civic Trust literature, n.d.). In the United States, such examples as the Illinois and Michigan Canal National Heritage Corridor (twenty-six miles out of eighty already completed) 'serves as the prototype for what could be the preservation movement's fastest proliferating instrument - grassroots, economy-driven, and collaborative heritage areas. Indeed, if 'historic districts' illustrated historic preservation's broadening purview in the 1980s, 'heritage areas' bear out the movement's increasingly expanded approach in the 1990s' (Oppenheimer Dean, 1995:18). David Sampson, director of the three-million-acre Hudson River Valley Greenway, agrees. At least eighty-five heritage areas have been designated at the federal, state or local level, since Congress gave the title to the Illinois and Michigan corridor in 1984 (Oppenheimer Dean, 1995:18).

The media are often at the forefront of changing attitudes. Trusts such as SAVE Britain's Heritage and the Alberta Historic Preservation Society use the media aggressively to stimulate public concern in cases where buildings are under threat. In fact, threats to historic buildings have accelerated concern for heritage and even when the building has been lost, public outcry has guaranteed that other preservation projects succeed. The media coverage as well as the commercial success of such landmark projects as Covent Garden in London, or Quincy Market in Boston, have helped to change attitudes towards acceptance of restoration and re-use.

The regeneration effected by these inner city projects has influenced the preservation field, as have environmental issues in the last thirty years. Re-use economics are gradually being considered as it is realised that scarce materials can be saved, energy use is less, and old skills and methods are still applicable.

Brian Anthony, Heritage Canada's Executive Director, notes:

> There is much common ground with the environmental movement and I think we should build strategic alliances there. There may be joint projects.... We should remind people that heritage is environmentally friendly (Vaillancourt, 1995:9-10).

Marcia Nozick, Co-ordinator of the Healthy Cities Winnipeg Initiative, spoke at the joint Heritage Canada-Heritage Montreal 1994 conference. She said we should:

> define a new meaning for heritage, one that is integrative, evolving and part of everyday life. The rediscovery of place and the reclaiming of home and local culture is integral to the process of building sustainable communities (Heritage Canada, 1994:19-20).

Heritage Canada's Declaration of Principles and Policies says:

> Heritage must be seen as a fundamental source of sustainable development. Traditional skills, heritage tourism and heritage entrepreneurship are relevant and timely examples of sustainable development (Heritage Canada: Impact, 1992:3-4).

Sustainable development is also a concern in the United States. Matthew J. Kiefer, a land-use lawyer and moderator at the National Preservation Conference in Boston, October 1994, suggests that instead of creating new communities based on the principles of historic neighbourhoods, it would be more efficient to revitalise existing old neighbourhoods (Kiefer, 1994:4). Christmas in April * USA is a non-profit organisation which has taken this opportunity. The Society provides volunteer labour to repair historic houses in the inner city owned by the poor or elderly.

Another aspect of revitalising historic areas is a potential growth in tourism, which adds significantly to the Gross National Product, especially in countries rich in history, such as Britain, Greece and Italy. Canada earned $17.2 billion from tourism in 1986, contributing 4% to the GDP, and representing 10% of the labour force. 'By the year 2000 it could be one of the most important single economic activities in Canada' (Brander & Lawson, 1988:2175-6). Although only a proportion of tourist visits are to historic sites and museums, the impact is significant. The English Heritage Monitor notes:

> it is estimated that there were 68 million visits made to historic properties in 1991, of which about half were to cathedrals or churches. This compares with 63 million admissions to museums and galleries, 20 million to wildlife attractions, and 11 million to gardens....Since 1976, visits to historic buildings have increased by 25%' (BTA/ETB Services, 1992:3).

The same phenomenon is apparent worldwide. In the Netherlands, two million people visited museums every year in the 1950s. Today (1995) there are twenty million. In

Beijing, China, ten million people a year visit the Forbidden City. In Kuala Lumpur, Malaysia, the museums are open every day all year round, and provide the main cultural attraction in the city (Mayor, 1995:80).

In the rural United States, tourism linked with historic preservation is suggested as the answer to development problems. Brian D. Cole, Eastern Oregon Regional Development Officer, writes,

> For rural communities with demonstrable tourism potential and significant historic resources, a tourism-development strategy based on historic preservation may be the answer. Studies have proved that small-town shopping and visiting historic sites are two of the top preferred activities of travellers (Cole, 1994:6).

Historic preservation trusts are being linked with tourism, development, education, national pride, sustainability and even profit. These linkages are occurring not only in preservation but in many fields, echoing worldwide trends as information systems improve.

It can be seen that during the last hundred years, significant changes have occurred in preservation. Changing attitudes towards public participation, economic growth and tourism, the role of government, sustainability, and the nature of history have built a foundation on which trusts can shoulder an increasing responsibility in preservation. This increasing responsibility and participation may even indicate that we are finally using history to 'illuminate reality, vitalise memory and provide guidance in daily life' as Cicero wrote, two thousand years ago.

TRENDS

Ideas on whether to preserve are changing as fast as ideas on what to preserve. The early preservation impetus to retain monuments of national achievement and the best architecture has now broadened to include aspects of daily living, both in Europe and North America, so that not only is the grand salon open to the public, but also the kitchens. People are interested in every aspect of life, not just the life of the privileged. Even the unpleasant facts of medical care, poverty, working conditions and so forth, are under study (Lowenthal & Binney, 1981: 220).

As more varied objects and buildings are being preserved, so the methods of preservation and display are changing. A more coherent view of the past is being presented, together with greater interpretation, with the area, buildings, objects, activities and actors being placed in context.

The museum with objects in glass cases (though often appropriate) is now being broadened to include theme parks and historic villages where an 'experience' is sought. Large numbers of tourists patronise these parks and this may have the effect of relieving pressure on genuine sites, such as delicate archaeological digs or controlled experiments in Iron Age farming. In these cases, it may be necessary to build a replica nearby that is accessible to the public to provide information while preventing any damage to the original site (Tony Rook, Director, Welwyn Archaeological Society, U.K., lecturing at the Calgary Society for Mediterranean Studies, University of Calgary, 14 October 1994).

Museums are increasingly merging with theme parks, for example in the York Museum and Robin Hood's Sherwood Forest, where the visitor is transported through dioramas, Disney-style. In Sovereign Hill, Australia, the visitor enters through a museum, sees a fifteen minute movie about the Goldrush, and then exits into the reconstructed village to experience life in a Goldrush town. The Landmark Trust (UK) allows the tourist to live for a week in a twelfth-century cottage, a Martello tower or a folly. At the Ironbridge Gorge Trust, the visitor clocks in like an iron mill worker and can participate in a lesson in the school. At Heritage Park (Calgary), the visitor can heckle a suffragette speaking on women's rights. Many historical villages blur the distinction in the public mind between a real village, a movie set, and a museum.

The proliferation of museums and heritage parks has resulted in fierce competition for the tourist dollar, with the result that imaginative schemes, such as festivals and special events, are constantly being devised to entertain and amuse. We can only anticipate that this will increase in the future.

Interpretation of sites is becoming a feature of the museum experience. It includes guided tours of museums (usually by volunteers) and enactments of historical scenes in heritage villages. Crafts are demonstrated and explained. Summer camps for children educate through costumed role-playing (Heritage Park), with meals cooked from historic recipes and games played with traditional toys.

Technology also plays a part in informing and amusing the visitor. Videos of old movies (Reynolds Museum, Alberta) or promotional material of the time (CPR exhibition, Glenbow Museum, Calgary) are shown. Computers simulate exhibits in use, or provide games to amuse and inform such as creating a dinosaur out of different body parts (Tyrrell Museum, Alberta). The price of technology is constantly being lowered, so we can expect to see its wider application in museums. These facilities will be expected by well-travelled tourists.

The public is also being educated about the scarcity of resources and energy, not only locally but at an international level. Conservation sites may increase in number as the preservation lobby steadily grows and the encroachment of cities, the pollution of industry and the effects of over-use are felt.

The problem of large numbers of tourists affecting world-renowned sites such as the Eiffel Tower or the Taj Mahal is a serious one. In the Calgary Herald, 4 March 1995, Antonio Savignac, Secretary-General of the World Tourism Organisation, forecast that the number of tourists worldwide will double by 2010. He suggests the tourist will have to book months ahead to see famous museums and monuments, and pay a premium if he or she visits in the peak season. The problem can be contained by limited access to the site, or by developing other sites.

Theodor Abt, President of the Society of Friends of the Royal Tombs of Egypt (based in Zurich), in the Calgary Herald 10 November 1990, says, 'We haven't a moment to lose. If you want to have your tourists and save your tombs, building replicas is the only answer'. Each day, three to five thousand tourists visit the tombs; two million tourists land in Egypt annually.

In the same article, mention is made of the problem at the Lascaux Caves in France, where one hundred thousand people visited per year. In 1963, the caves were closed. In 1983, a facsimile was opened, and caters to four hundred thousand visitors annually.

On the other hand, many important sites are still undeveloped. Much archaeological work remains to be done in such countries as Pakistan, which contains relics of the Silk Road. To avoid over-use of a site, emphasis will perhaps be put on the wider picture of a culture, rather than a single monument (Robertson Collins, ICOMOS Conference, 22 October 1994, University of Calgary). Co-operation through UNESCO and ICOMOS will assist development.

Controls on use of landmark buildings, archaeological sites or wilderness areas may become stricter with over-use, but as the public becomes more concerned about these problems, the controls will be accepted. In fact, international pressure to protect areas as World Heritage Sites may increase, driven by conservation lobby groups. (A World Heritage Site is a cultural or natural site that is designated as having outstanding universal value by the World Heritage Committee, according to its criteria. The committee was established to oversee implementation of UNESCO's 1972 World Heritage Convention. In January 1995 there were 440 World Heritage Sites, 326 of which were cultural, 97 natural and 17 mixed (Mayor, 1995:80) Ten of these sites are in Canada.)

International co-operation may be stimulated by historical links, such as Christopher Columbus and his discovery routes. More than forty countries were expected to take part in a three-month Expo, 'Colombo '92: Ships and the Sea', held in Genoa, Italy (Calgary Herald, April 18, 1992). The Italian government pumped $850 million into the city to get ready for Expo, indicating confidence in the success of this major event. Although this is a government initiative, international connections are increasingly being made by the trusts themselves (Groundwork, Landmark Trust, UK).

In Alberta, Neil McNeil, manager of the Calgary office of Alberta Tourism's business development branch, said in 1990 that tourism is driving investment in Alberta. He cites more than 200 tourism-related projects worth more than $2 billion were under construction or on the drawing board (Calgary Herald, 22 November 1990).

Tourism can be a powerful generator of funds and of preservation. 'Sightseeing in the UK, 1990' (sponsored by four tourist boards) cites total visits to tourist attractions in the UK in 1990 as being 349 million. When the visits to museums, galleries, historic properties and churches are specified, they make 43% of the total visitation (BTA/ETB Research Services, 1991:4). These figures provide a sound base on which trusts can plan for the future.

The figures above indicate that we find the past an absorbing hobby. Our study of history will continue to be effective, accurate and enjoyable with improving information technology, while conservation technology will ensure that we maintain the tangible evidence of the past.

A Latin American proverb says, 'Nobody can tear himself away from his own shadow'. The increasing number of people involved with preservation, many of them working with trusts, bear out this idea. In the next chapter, the effectiveness of trusts as a tool for preservation will be examined.

CHAPTER 3: CASE STUDIES

INTRODUCTION

In this chapter the choice of trusts is explained, the preservation background in each country is outlined, and information on the trusts working in that country is given. Each trust's philosophy and mandate is described by quotations from the trust literature. This is followed by a description of good practice, and the trust's vision of the future. More detailed information on each trust is given in Appendix II.

THE CHOICE OF CASE STUDIES

The following trusts have been chosen to provide a wide range of examples. Some of these trusts are large, influential and well-established (such as Pittsburgh and the Civic Trust) while others are small, and struggling to get established (Alberta Historical Society). The trusts have an urban and rural spread of interests (Heritage Park, Groundwork, Civic Trust, Landmark), some purely historical (Landmark, Fort Calgary) some more environmental (Groundwork) and some a mixture of the two (Civic Trust) which will probably become more common. One trust has property in three countries (Landmark), others are countrywide (Civic Trust, Groundwork, SAVE), while yet others focus on one city (Pittsburgh), one area of a city (Old Strathcona), or one site (Heritage Park, Fort Calgary). Two of the trusts work specifically in advocacy (SAVE and Alberta Historical Society) and three own no property (SAVE, Alberta Historical Society, Old Strathcona).

Despite this variety, common elements occur in their organisation and in the philosophy which created them. These common elements can be used as reference points in analysing a current trust, or creating a new trust. To illustrate the progress of a young trust in Alberta, the Alberta Historical Preservation and Rebuilding Society has been included.

The nine case studies follow in three sections: Britain, the United States and Canada.

LIST OF CASE STUDIES

THE GROWTH OF PRESERVATION IN BRITAIN

BRITAIN:

- Civic Trust
- Groundwork
- Landmark Trust
- SAVE Britain's Heritage

THE GROWTH OF PRESERVATION IN THE UNITED STATES

U.S.A.:

- Pittsburgh History and Landmarks Foundation

THE GROWTH OF PRESERVATION IN CANADA

CANADA:

- Old Strathcona Foundation
- Alberta Historical Preservation & Rebuilding Society
- Fort Calgary Preservation Society
- Heritage Park Society and Foundation

THE GROWTH OF PRESERVATION IN BRITAIN

Preservation initiatives were first instigated in Britain over a hundred years ago. William Morris' Society for the Protection of Ancient Monuments was founded in 1877 to protect buildings from over-zealous restorers as much as from neglect. Legislative machinery began with the Ancient Monuments Act of 1882. The National Trust for Places of Historic Interest or National Beauty was founded in 1895. The Ancient Monuments Society was formed in 1924 and the Council for British Archaeology in 1943.

Preservation efforts by the National Trust were initially directed towards protecting public access to the countryside. Its first building (bought in 1896) was medieval, echoing the values of the times, but threats to houses built since the medieval, Tudor or Jacobean periods began to stimulate a change of values. The Society for the Protection of Ancient Buildings could not deal with neo-classical architecture, so The Georgian Group was founded in 1937. This Group was the focus of a revival of interest in the architecture of 1714-1830. The Group works in concert with the National Trust to this day. The Victorian Society was formed in 1958 to preserve vanishing Victorian architecture. There are three national preservation trusts: The Church and Historic Preservation Trust, Industrial Buildings Preservation Trust and The Vivat Trust. The Architectural Heritage Fund (1976) provides capital for these building preservation trusts. It is a non-profit company with charitable status.

In 1946, the National Land Fund was established with fifty million pounds sterling, to be used to compensate the government for loss of cash when estates were donated to the National Trust in lieu of taxes. The system of listing buildings, graded according to merit, was introduced in the 1947 Town and Country Planning Act (Hewison, 1987:61).

The Civic Trust was founded in 1957. It promoted both high quality in architecture and planning design, and the improvement of the environment. It was concerned less with an architectural period and led the way to a broadening of possible types of trust. Funded largely by commerce and industry, it acted as a co-ordinator of local preservation societies.

In 1975, the Civic Trust undertook to organise the European Architectural Heritage Year for the British government. This proved to be of major importance in the publicity of preservation and spawned many initiatives. The Trust still administers the Architectural Heritage Fund set up in 1975, which is a major source of capital for conservation projects (6.4 million pounds lent to 144 projects by March 1988 with 4.4 million repaid) (Pearce, 1989:32).

Other factors in the drive to preserve Britain's heritage were the proposed wealth tax and capital transfer tax of 1974. The campaign against this tax together with the European Architectural Heritage Year both stimulated concern for heritage.

The Victoria and Albert Museum in London mounted an exhibition called The Destruction of the Country House: 1875-1975 which identified the thousand or so houses that had been lost in the last century. Patrick Cormack wrote Heritage in Danger in 1976 which formed the basis for a television series. In 1976 the wealth tax was abandoned. The heritage campaign had succeeded (Pearce, 1989:66-69).

Today the National Trust has over two million members. The Civic Trust has 300,000 members in 1,200 local preservation societies. These are people educated in preservation. They make up a powerful lobby and are active in planning. There are now (1991) ninety-seven building preservation trusts in England (Binney & Watson-Smyth, 1991:10-17).

CIVIC TRUST (Britain)

WHAT IS THE CIVIC TRUST?

The Civic Trust is an independent charity founded in 1957 by the late Lord Duncan-Sandys. Its Patron is H.R.H. The Prince of Wales.

But the Trust is no vehicle of centralised paternalism. It has long realised that the best results can never be achieved without the fullest possible community involvement.

It works with Government, local authorities, business, industry and voluntary organisations - whichever happens to be right for the job in hand. Conflicting interests? They come up quite often, but the Trust has a talent for reconciling them - and not at the cost of soothing compromises.

Its credentials as a charity help here. It has no partisan or ideological axe to grind. Neither is it a quango - a Whitehall offshoot in camouflage. If it gets any Government money (and it gets far, far less than some comparable organisations) it has to earn it. For the rest of its income it looks - in businesslike fashion - for what it can raise by way of sponsorship, project support, membership income, and covenants and donations.

The Trust promotes improved quality in the Built Environment by:

- Raising Awareness and Standards.
- Demonstrating through practical example.
- Developing a Community voice.

Above all it tries to be responsive. Thanks to its flexibility and range of professional skills, a single enquiry - and not necessarily from an official organisation - can sow the seed for a new project or initiative.

(Civic Trust pamphlet, n.d.)

GOOD PRACTICE

- The Civic Trust operates with the community, encouraging vision and high standards of design, but emphasising the practical side and making it plain that the trust is an enabler and guide for the community's action.

- The trust creates spin-off groups (Amenity Societies) to continue the work of preservation with local involvement through small, committed groups.

- The trust builds on experience and responds to needs, with no set formula to deal with problems. It avoids bureaucracy. Its mandate remains wide.

- The trust effectively uses a wide range of partnerships and networks for financing and promotion.

- The trust is active in seeking out new opportunities and solving problems. The revitalisation achieved is a direct attempt to improve social conditions.

- The trust continues to educate government in the importance of heritage. It believes in establishing the machinery to grasp opportunities in the future.

- The trust maintains a balance of activities between practical projects, education and promotion, and community involvement.

THE FUTURE?

> One of the Trust's strengths has always been that it looks ahead. Its 'stitch-in-time' techniques aim to ensure that future problems are alleviated, if not eliminated; that machinery is in place so that opportunities which might otherwise be missed can be grasped.
>
> The Trust will:
> - Sustain its impartiality and use it to reconcile conflict, particularly between economic development and the environment.
> - Continue to campaign against mediocrity of design and give greater emphasis to environmental and design education.
> - Provide impetus and inspiration for community groups by strengthening its regional resources.
> - Establish itself as a 'third arm' force in promoting and carrying out community-based projects and initiating new forms of partnership.

(Civic Trust literature, n.d.)

GROUNDWORK (Britain)

WHAT IS GROUNDWORK?

Groundwork is a network of charitable companies operating in partnership with the Private Sector, the community and local and national government to bring about positive, long-lasting, environmental improvements throughout the country.

Combining its own environmental and landscaping expertise with the talents and resources of Industry, Commerce and other sectors of the community, Groundwork is a unique catalyst which offers innovative and effective solutions to problems of environmental regeneration in and around many of our towns and cities.

In addition to greening the urban landscape, it is re-shaping attitudes towards it and helping to create environments that encourage and sustain enterprise, prosperity and enjoyment.

(Groundwork Today newsletter, Issue 13, 1990)

Groundwork's track record speaks for itself. More than 3,000 environmental projects have been completed throughout Britain in five years, with more than 3,000 organisations and 50 local authorities partnering Groundwork in the Eighties alone.

(Looking to a Greener Future; Groundwork pamphlet, n.d.)

The charitable companies "are administered by a Board of Management - leading businessmen, councillors and voluntary sector representatives from the local community - and are professionally run by an Executive Director and a team of environmental and landscape specialists. They work with industry and all the other sectors of the community to choose schemes, secure funding - and get the work done."

(Looking to a Greener Future; Groundwork pamphlet, n.d.)

GOOD PRACTICE

- Groundwork sees itself as environmental entrepreneurs, with the flexibility to grasp opportunities and allow for individual differences. It gives its staff a lot of responsibility.

- Groundwork has a reputation for good financial packaging based on its early difficulties and this allows it to create financial partnerships with a wide variety of institutions.

- Groundwork succeeds by doing a lot of its work through local groups and partnerships with business and industry, for project work, financing, education and promotion.

- Groundwork sets up local groups all over Britain to continue and multiply environmental work, providing assistance from the head office. This maintains local commitment.

- Groundwork looks beyond Britain to an international exchange of ideas and trainees.

- Groundwork emphasises education and training to enlarge the pool of present and future environmental experts. It uses innovative schemes to educate at different levels through the latest technology.

- Groundwork tackles a variety of projects with aims other than financial success. This is possible through cross-subsidy from 'commercial' projects.

THE FUTURE?

> One of the things we have got to do is to keep things small and very flexible wherever possible, to keep down the overheads. We also want to avoid bureaucracy and hardening of the arteries (John Iles, Director of Trust Development, Status Report for Industry Year, 1986:16).

Working primarily in depressed industrial areas, Groundwork sees the need for revitalisation and job creation increasing. "But we have also got to work out ways of increasing the job creation impact of our activities" says John Iles, despite the conflict between the type of projects which the Manpower Services Commission will fund and the low returns which these projects generate for Groundwork.

Groundwork is developing independent fee income through landscape projects to resolve funding problems. It is also planning to achieve a higher profile which will help to attract sponsorship and donations.

> Groundwork hopes to "rekindle the enterprise of communities which were once the powerhouse of the Industrial Revolution." "We are looking for people...who believe that the remedy is in their own hands (Status Report for Industry Year, 1986:16).

> To ensure that the private sector gets involved, Groundwork recognises that local companies must be brought into the initiative at the earliest possible moment (Status Report for Industry Year, 1986:16).

Groundwork also wants to expand its activities from tree-planting and woodland management to "an enabling service for all kinds of environmental jobs that industry wants done" (John Davidson, Status Report for Industry Year, 1986:16).

Groundwork wants to expand from the north west to other parts of urban Britain, providing professional staff to work with local leaders. The Trust aims to establish four or five new trusts each year.

Groundwork wants to find new ways to work with industry to solve environmental problems and to find ways to exploit the commercial opportunities in this field. It also realises that if it wants to work with private companies, it must go to where they are active and flourishing, not only to depressed areas.

Increased leisure reveals opportunities for Groundwork to design or map paths for walkers, organise cycle-hire schemes, clear up old railway lines, enlarge car parks in tourist spots, rebuild dry-stone walls, upgrade city green belts, organise heritage weekends and environmental education programmes, and so on.

Groundwork wants to change not only the environment, but the way people perceive the environment, so that people take care of their surroundings, vandalism is reduced, and the economy revitalised (Status Report for Industry Year, 1986:15).

LANDMARK TRUST (Britain)
WHAT IS LANDMARK?

The Landmark Trust is a charity which rescues buildings in distress, and then tries to revive them and give them a new life. It was started in 1965 to tackle projects too troublesome or unfashionable for anyone else. These usually involve minor but good-looking buildings, put up with thought and care, which are no longer wanted for their original purpose, and which cannot be saved from destruction or decay unless a new use can be found for them.

Often the best solution, so it seems to us, is to let them for holidays. There is seldom a suitable public use. To turn them into permanent homes may be impossible, or call for alterations and additions which would spoil them. As the weekend or holiday retreats of individual owners they would lie empty and unenjoyed for most of the year; but let by us they are occupied almost all the time, and an income is generated for their maintenance. Moreover, in this way a constant succession of different people can actually live, however briefly, in historic buildings of every age and style. A stay in a Landmark is meant to be not just a holiday but an experience of a mildly elevating kind.

So far we have worked on nearly 200 buildings....Many have come our way through schemes undertaken jointly with the National Trust or other charities, or with local authorities. Most now actually belong to us, though a few we hold on long leases. All are remarkable in some way -- for their architecture, history, atmosphere, or situation. We have no favourite period or style, although we lean towards the humble and the functional....We try not to take out of the 'housing stock' any building which could be made into a satisfactory modern home without spoiling it -- and in fact we have some 50 long-term tenants." "The work is done by a small and rather scattered staff, mostly part-time.

(Landmark Handbook, 1989:6-8)

GOOD PRACTICE

- Landmark plans for the long-term because it maintains ownership of its restored buildings indefinitely, unlike much project work.

- Landmark's reputation for high-quality restoration is based on a small group of experts who have been with the trust for a long time.

- Landmark is sensitive to community reactions. Its policy is sympathetic and unobtrusive re-use of buildings and use of local labour, with occasional Open Days.

- Landmark's success is based on allowing the public to experience living in historic buildings, albeit temporarily. It fills a niche in the preservation 'experience'.

- Reliable funding has been the base of Landmark's steady growth, but as this is now doubtful, innovative funding ideas have been implemented.

THE FUTURE?

"As the Landmark Trust grows bigger and older we do our best to prevent it from becoming stiffer as well" (Landmark Handbook, 1989:8).

Communication is a field in which Landmark is expanding. In 1988 Landmark instigated a gathering of staff, architects, regular visitors and others involved to inspect a newly-acquired building and see an exhibition of projects in hand or planned. Open Days were also arranged at several properties to involve and inform the public. From 1989 a newsletter has been sent to Landmark visitors.

Landmark's aim continues to be: "to rouse people's interest in their surroundings in the widest sense - their surroundings in space and time" (Landmark Handbook, 1989:8-9).

SAVE Britain's Heritage (Britain)

WHAT IS SAVE?

> SAVE was formed in 1975 - European Architectural Heritage Year - by a group of journalists, historians, architects and planners to campaign publicly for endangered historic buildings. Through press releases, lightning leaflets, reports, books and exhibitions, SAVE has championed the cause of decaying country houses, redundant churches and chapels, disused mills and warehouses, blighted streets and neighbourhoods, cottages and town halls, railway stations, markets and cinemas.
>
> From the start, SAVE has always placed a special emphasis on the possibilities of alternative use for historic buildings and in a number of cases, prepared its own schemes for re-use of threatened properties. On repeated occasions, SAVE has been instrumental in persuading owners of empty buildings to place them on the market or repair them. SAVE is also very active on the broader issues of preservation policy. SAVE has produced over 80 publications.

(SAVE literature, n.d.)

GOOD PRACTICE

- SAVE uses effective promotional and communication techniques, such as inviting well-known experts to comment on preservation, producing rapid press releases, attacking all aspects of heritage problems, and threatening to take legal action.

- SAVE is able to deal with a variety of problems such as demolition threats, legal problems over maintenance of buildings, and sale of buildings and contents.

- SAVE has organised a variety of funding resources to support itself without regular grants.

- SAVE has maintained a clear focus on advocacy, both through action and publications, and has not become a property owner or manager. SAVE believes in constructive alternatives and works as a catalyst to achieve these aims. It encourages the formation of action groups.

- SAVE has not only dealt with immediate problems as they arise, but looks to the long-term. Its first report (1975) included a list of recommendations which resulted in a new statutory historic buildings committee, English Heritage. It continues to make recommendations in its publications.

- SAVE encourages the public to become the watchdog and alarm system on conservation matters. Its publications are aimed at continuing the education of a wide public in historic preservation problems.

THE FUTURE?

SAVE has continually pushed for more comprehensive listing of historic buildings, until, in 1988, buildings could be listed after thirty years. This has now been modified to include outstanding buildings only ten years old. SAVE will continue to work for government action in this area.

SAVE supports the establishment of conservation areas (initiated by the Civic Trust) and the preservation of buildings which are not of individual merit, but which create a coherent area. This movement is continuing.

The future of many non-conformist chapels is uncertain, as no institution has been formed to preserve them. SAVE would support the formation of a national trust for historic chapels. Historic parks and gardens, likewise, have little protection. They are threatened by road building and golf course construction. SAVE would like to see these parks designated as conservation areas.

SAVE would like to see local authorities serve owners of decaying listed buildings with Repairs Notices under powers given them by Parliament. SAVE believes concentrating funds on demonstration projects by Government would encourage conservation efforts across the country and aid revitalisation (SAVE's Action Guide, 1991:148-153).

THE GROWTH OF PRESERVATION IN THE UNITED STATES

As in Britain, the first significant act of preservation was to protect natural areas. An Act of Congress in 1872 created Yellowstone National Park. In 1889 Casa Grande in Arizona was designated a national monument. The Antiquities Act of 1906 provided the mechanism to declare any landmarks, structures or objects of historical or scientific interest, on federally owned or controlled land. In 1916, the National Park Service was created 'to conserve the scenery and the natural and historic objects and the wildlife therein' (Maddex, 1983:10 & 152). Preservation legislation had been passed at local and state levels by the 1930s. The 1935 Report to the Secretary of the Interior on the Preservation of Historic Sites and Buildings indicated that public interest in preservation was great, but federal activities were found wanting. The Historic Sites Act of 1935 laid the groundwork for preservation activities. Many projects during Roosevelt's New Deal in the 1930s were historical surveys and guides.

World War II changed preservation activity from the federal to the private sector. The private sector saw the need for a national organisation. It was believed that a private organisation could use volunteer support, handle emergencies more easily than a large government department, and act as liaison between public and private agencies. In 1947, two organisations were planned: The National Council for Historic

Sites and Buildings (to acquire members and increase interest in historic preservation) and The National Trust (a legal body which could buy and manage historic properties). The National Trust was 'organised along the lines of the National Trust in England' (Maddex, 1983:153). By 1953, the two organisations had merged as the National Trust for Historic Preservation (Malloy, 1976).

The National Trust goals were to educate and inform the nation on preservation and to mobilise the public to form preservation groups. A permanent preservation fund was needed. The Trust planned to do historical research and make its properties models of preservation and interpretation, and to educate and publish. In 1948, this credo was adopted: 'generally speaking it is better to preserve than repair, better to repair than restore, better to restore than reconstruct' (Maddex, 1983:154). Together with the National Park Service, the Library of Congress and the American Institute of Architects, the Trust became involved in establishing the Historic American Buildings Survey Inventory in 1953.

The Trust initiated an award system in 1957. A travelling exhibit, Architecture Worth Saving (1958) drew attention to the preservation work. Recruiting and training professionals in the field began the same year. By 1961 the Trust published more frequently and was concerned with legislative developments. It held an annual conference. Preservation: Heritage of Progress (1961) was a photographic display to dramatise the losing preservation battle. In 1963, a national conference on preservation was held at Colonial Williamsburg. The goals were to broaden the National Historic Sites Survey and plan for urban growth.

The Special Committee on Historic Preservation in 1966 described conditions in the United States: preservation must give 'a sense of orientation to our society, using structures and objects of the past to establish values of time and place', principally because of the mobility of the population (Maddex, 1983:193).

This 'sense of orientation' could be achieved through:

- a recognition of the importance of architecture, design and aesthetics combined with historic and cultural values;
- concern with historically and architecturally valued areas with meaning for the community;
- study of economic conditions and tax policies which will enable preservation (Maddex, 1983:193-194).

In 1966 the National Historic Preservation Act was passed, to begin a national survey. 'National significance' as criterion for preservation was now extended to 'local significance'.

This Act is still the basis for American preservation initiatives.

A second Williamsburg conference in 1967 recommended that preservation should include districts, industrial buildings, gardens, open spaces and interiors. Preservation became more acceptable as the public realised that their cultural heritage included their own communities and environmental concerns.

The National Trust now has a quarter of a million members and operates in fifty states. Its emphasis is on 'historic environments' rather than monuments. Funding is largely from private sources, with the Department of the Interior providing matching grants of 22%. Unlike the British National Trust, the National Trust for Historic Preservation has never had sufficient government support or funds to lend to specific projects. It has not become a major landowner. Acting rather as liaison and resource organisation, it has assisted local preservation groups. It also creates a link between the National Park Service and private groups.

PITTSBURGH HISTORY AND LANDMARKS FOUNDATION (U.S.A.)

WHAT IS THE PHLF?

> The PHLF is big business in a big business town. It began buying, restoring and renting out houses in wavering neighbourhoods. Today, its biggest project is Station Square, a 52-acre ex-railroad depot.

(PHLF literature, n.d.)

> Arthur Ziegler, a former college English professor started the Foundation. He had a talent for entrepreneurial development and for locating sources of funds. "Pittsburgh is particularly well endowed in this area. Its great industrial princes have left behind foundations, corporate headquarters and wealthy descendants. Moreover, as a largely blue-collar town, it has had reasonable access to the Federal treasury. With such generous underpinnings, the Foundation has generally chosen to go in and do renovation work itself instead of acting as facilitator.

(PHLF literature, n.d.).

> Architectural historian James Van Trump brought Ziegler together with Pittsburgh's leading preservation-minded citizens. "The combination of drive, concern and clout has earned PHLF the reputation of a group that delivers.

(PHLF literature, n.d.)

GOOD PRACTICE

- The PHLF, with the leadership of Arthur Ziegler, has maintained a policy of risk-taking, while maintaining a long-term strategy and clear objectives.

- The PHLF has cemented partnerships which enabled it to achieve restoration in an initially hostile environment.

- The PHLF has created a high-profile project with Station Square that has attracted public interest and financial assistance from the city and business.

- The PHLF has the flexibility to change direction from project work to education and technical assistance.

- The PHLF has organised projects in stages so that achievements are more readily seen, and a sense of accomplishment boosts the next stage of the project.

- The PHLF has used model projects (restoring a key building in an area) to encourage the donation of funds to complete the project.

- The PHLF advertises its needs and thanks its donors publicly, creating funding success.

- The PHLF uses a mix of funding for its projects and builds liaisons between lending institutions, its excellent financial reputation providing the basis for confidence in investment.

- The PHLF has effective and consistent communication techniques.

- The PHLF has chosen projects based on a need, particularly revitalisation of the city. Through these projects, it intends to increase awareness of preservation, to increase tourism and improve the economy.

THE FUTURE?

The PHLF has pulled out of neighbourhood preservation and is liquidating the properties it owns. It has found that restoring a single house as a model is an effective stimulus and guide for the whole area.

The PHLF is now concentrating its efforts on the massive Station Square Project, begun in 1976, which is based on the success of Ghiradelli Square in San Francisco. The Foundation leased one parcel of land at a time as it was ready to develop it. Step by step it has developed restaurants, shops, office buildings, conference facilities, a Sheraton Hotel, excursion boats and a sports garden. Station Square is now in Phase II (1993-2008) with another twenty-six acres to be developed.

Further renovation will take place, together with the creation of gardens, the construction of two more hotels, a conference centre, three office buildings, an entertainment complex, an exhibition hall, and more than 300 housing units throughout the site.

Preservation is clearly being combined with construction in an effort to revitalise this area of Pittsburgh. Historic buildings are being used as a springboard for development with a historic flavour. It also emphasises education and technical assistance.

THE GROWTH OF PRESERVATION IN CANADA

Formal preservation legislation began in Canada with the 1887 Rocky Mountains Parks Act which protected Banff National Park, established in 1885. The impetus behind this legislation was the protection of the hot springs and surrounding natural beauty from private exploitation. The world's first bureau of national parks, the Dominion Parks Branch, was created in Canada in 1911 within the Department of the Interior. One hundred years later, there are thirty-four national parks and hundreds of provincial parks in Canada. The national parks are equal to 1.8% of Canada's landmass (Marsh, 1988:1616-20).

Preservation included both natural and historic sites. In 1917, Fort Anne, Nova Scotia, was the first historic park established. The Historic Sites and Monuments Board was established in 1919 to advise the government on sites of national significance. At this time the choice of site depended on significant national events such as battles or political successes. Preservation was influenced by the success of large projects in the United States, such as the reconstruction of Colonial Williamsburg in the 1920s. Public works projects during the Great Depression also stimulated restoration (Taylor, 1988:991-2).

As in Britain and the United States, emphasis has gradually changed to include the history of industrial development, ordinary people's daily lives and pioneer villages. Interest in historic sites increases. By 1976, 200 restorations were visited by 7.8 million people. By 1989-90, 368 historic sites reported almost seventeen million visits (Dugas, 1993:4-5).

In 1930 the National Parks Act established the guiding principles for the management of national parks. Although preservation of nature and wilderness was the initial goal, this broadened to include a federal system of heritage sites which include National Historic Parks, National Historic Sites, Heritage Canals, Heritage Rivers and National Marine Parks. These comprise Environment Canada, Parks, administered by the Department of the Environment since 1979. Environment Canada, Parks, is also responsible for fulfilling Canada's obligations under the World Heritage Convention of the United Nations Education, Scientific and Cultural Organization (UNESCO), protecting natural and cultural sites.

Three events propelled heritage conservation in Canada. First, the St. Lawrence Seaway, which opened in 1959, destroyed many historical buildings. Second, in 1967, Centennial Year focused attention on celebrating heritage. A third influence was the growth of worldwide interest in ecology (Kapelos, 1988:981-2). These events prompted the federal government to establish the Canadian Inventory of Historic Buildings in 1970. All important buildings constructed before 1914 were to be recorded. The Inventory noted 200,000 surviving historic buildings across the country. It has now expanded its role to that of a modern information management centre (Martineau, 1995:12-13).

The federal government owns by far the largest number of these historical buildings. The Policy on Federal Heritage Buildings (1982) is to identify, classify and preserve heritage stock. The primary responsibility for protecting heritage, however, rests with the provincial governments. The federal government has the power to purchase and administer historic properties, but provincial governments control culture, education and the regulation of property. The instruments now available to most major municipalities for preservation, are:

- official planning acts;
- plaquing bylaws;
- environmental assessment procedures;
- holding bylaws that give temporary protection against demolition;
- zoning bylaws controlling height, bulk and use of buildings;
- the power under specific heritage legislation to designate heritage districts within which construction and demolition are controlled;
- design bylaws;

- limited powers to support renovation activities through grants, assessments, and tax collection measures;
- public building revitalisation plans.

Both government and private initiatives have increased preservation. A private lobby group, the Heritage Canada Foundation, was formed in 1973 as a non-profit, charitable organisation under the Canada Corporations Act. Although it was created by the federal government, it has a broad mandate and freedom of operation. It is the national heritage trust (with over 20,000 members in 1990) and concentrates on heritage resources within the federal jurisdiction. In his years as Executive Director (1978-1995), Jacques Dalibard has changed Heritage Canada's direction from being an owner of properties to stimulating local initiatives (Godfrey, 1995: 5-7). Brian Anthony, Heritage Canada's new Executive Director, sees the organisation moving in the direction of creating partnerships with environmental groups, heritage groups and the community (Vaillancourt, 1995:9-11).

In 1994 the Rt. Hon. Jean Chretien, Prime Minister of Canada, announced the creation of a Canadian Tourism Commission as a cornerstone of the government's national tourism initiative, with emphasis on culture as well as scenery. The Department of Canadian Heritage, a division of Parks Canada, believes:

> there is room to grow in the area of heritage-related tourism. Heritage-related activities form part of about 35% of all

trips undertaken in Canada by Canadians and visitors from other countries. However, only a portion of all such trips are primarily aimed at experiencing heritage. A concerted effort in the area of heritage tourism in Canada is therefore likely to yield increased benefits, both in terms of new employment and business opportunities and greater awareness of, and support for, Canada's natural and cultural heritage (Cayen, 1995:8-9).

The first year of the Department's Heritage Tourism Programme was in 1995. It plans to contribute to the design of new experience packages, as being more effective than increasing physical development.

Government initiatives are matched by the private sector. There are now over 850 private societies, agencies and foundations in the preservation field in Canada. Provincial federations such as the Federation of Alberta Heritage Societies co-ordinates the activities of some of these organisations. Seven major non-governmental philanthropic foundations are interested in heritage, including the Devonian Group of Charitable Foundations and the Samuel and Saidye Bronfman Family Foundation. Despite the numbers of people involved in preservation, much remains to be done. 'Some of the most pressing needs relate to revision of income tax policy, the National Building Code, and the creation of a federal heritage funding body' (Heritage Canada: Impact, 1992:3-4). Delegates at the 'Heritage in the Nineties Conference' (Edmonton, 1990) said, 'This tokenism must end. Heritage is significant, vital and relevant, every day of the week' (Heritage Canada: Impact, 1992:3-4).

OLD STRATHCONA FOUNDATION (Edmonton, Canada)

WHAT IS THE OSF?

> The Old Strathcona Foundation is a registered non-profit, volunteer organisation founded in 1974 and dedicated to the preservation and revitalisation of the Old Strathcona area and its heritage through historical, social and cultural activities.
>
> The aims of the Foundation are to enrich the social, cultural and commercial life of Old Strathcona while honouring its past; to undertake and finance carefully selected restoration and renovation projects; to encourage businesses and residents to restore their own historic premises and to develop an historic streetscape characteristic of Old Strathcona.

(OSF literature, n.d.)

In the last twenty years, the OSF has made an appreciable difference to Whyte Avenue and environs, the heart of Strathcona. As well as the restoration of buildings, the community has been organised and educated to the value of preservation. Revitalisation and an increase in tourism has occurred.

GOOD PRACTICE

- The OSF has placed emphasis on the restoration of a discrete area, including buildings, parks and social events. This allows intensive local involvement and a sense of ownership which builds successes.

- The OSF has established broad-based funding, with events often organised by the community, thus increasing involvement.

- Restoration of the Princess Theatre has proved financially worthwhile and a high-profile project.

- The OSF has increased the number of partnerships with local companies despite a slow economy, with a view to further restoration projects.

- The OSF finds communication is effective locally through the Farmers' Market and the tourism information booth, and through publications and workshops. Innovative ideas such as parades, dances and walking tours have involved the public.

- The OSF is both collecting archival material and disseminating historical information. It aims to reach and educate a wider public through its oral history programme, its Plaindealer Magazine and various publications.

- The OSF has concentrated on the immediate impact of main street restoration and public-use buildings, leading to increased local enthusiasm and the valuable support of the Merchants' Association.

THE FUTURE?

The OSF is pursuing several goals. The development of a historical interpretative master plan for the area is considered an important tool in further development. Historic district designation for Old Strathcona would increase awareness of preservation and lead to a greater number of buildings being saved, so the Foundation is working towards this goal.

Historical research on the community and area is planned. Interpretive programmes and the Strolling History Players events are going to be expanded.

ALBERTA HISTORICAL PRESERVATION & RE-BUILDING SOCIETY

(Calgary, Canada)

WHAT IS THE AHPRS?

Formed in 1990 as a result of threats to two historic houses in Calgary, the Society remains a volunteer advocacy group working with the City of Calgary land department, the City's heritage planner, the Alberta Historical Resources Foundation, the Heritage Advisory Board, community associations and individual owners of historic properties.

Through negotiation and use of the media the Society has become a recognised force in the prevention of demolition in the city. It has also had some influence in changing legislation to protect heritage buildings. It is working towards tax legislation changes throughout Canada to assist preservation. It feels strongly that a Canadian identity is being lost through demolition.

The Society responds to individual and community inquiries for help in preservation matters. It assists community associations and other historical preservation groups with threats to historic buildings.

Education is also an important part of the Society's mandate. One aspect of the education policy is that during Heritage Week in August every year in Calgary, the Society adorns historic buildings with red and white bows to increase public awareness. The Society also participates in the 4th Street Lilac Festival every spring.

Application for a charitable number is taking some time and frustrates the Society's ambitions to create funding sources. Without more extensive funding, physical projects are limited, and the Society remains an advocacy group. A charitable number will not be given to an advocacy group, however, so the group has to enlarge its educational role (walking tours, pamphlets, brochures, slide talks) as well as taking at least the first step in restoring a building. Access to the Society's complete set of minutes is also required. In this chicken and egg situation, the Society has difficulty in fulfilling the requirements for the charitable number.

(AHPRS literature, n.d.)

GOOD PRACTICE

- The AHPRS works effectively as an advocacy group, reacting swiftly to public concern over threats of demolition.

- The AHPRS uses its contacts in City Hall, with other preservationists, with the media, and with community associations, to counteract threats to preservation.

- The AHPRS looks to the long-term to change tax legislation as the basis of successful preservation.

- The AHPRS communicates to the public via the media and a quarterly newsletter. Effective use of local television and radio stations has regularly been made. The Society is active during Historic Calgary Week and at the Lilac Festival, increasing public awareness.

THE FUTURE?

The Society aims to become more pro-active and less reactive with time. When a charitable number has been obtained and fund-raising can be expanded, the Society plans to begin buying and restoring buildings.

A balance of projects will be maintained among physical restoration, advocacy, education and community work.

FORT CALGARY PRESERVATION SOCIETY (Canada)

WHAT IS FORT CALGARY?

The Fort Calgary Historic Park, located on the site of the original N.W.M.P. fort, preserves and interprets Calgary's history through an interpretive centre and a 40-acre riverside park.

Within the interpretive centre is a museum, a hands-on discovery room, a theatre, an audio-visual presentation and a shop. The outline of the fort is indicated, and a recreation of the fort has been started. This will create a visual focus for visitors and will demonstrate historical construction techniques.

The Society operates the Deane House across the river. This is a historic house which is used as a restaurant.

Education plays a large role with curriculum-based historical programmes for school children, films and interpretive programmes.

(Fort Calgary literature, n.d.)

GOOD PRACTICE

- Flexible management policy allows the FCPS to streamline its committee system for greater efficiency.

- Flexibility is again shown in the move to augment the strong educational role of the FCPS with project work such as the re-building of the Fort.

- The FCPS can devise and implement innovative financial policies such as the PostMark Campaign to offset funding decreases.

- Partnerships are a feature of management, both for donations and work in kind, and ties with local communities.

- The FCPS takes advantage of its historical significance by emphasising its role in tourism in Calgary, making connections with the travel industry and advertising widely.

- The FCPS tailors its educational programmes to curriculum requirements to fill a need in schools and to interest school children in history and preservation.

- Seasonal events are effective in attracting local residents and extend the active life of the site beyond the tourist season.

THE FUTURE?

Following a period of slow growth, long-range development plans were adopted in 1992 which will create positive growth. Staff restructuring has led to a leaner organisation. Anticipating further financial restraint, the Society has increased focus on fund-raising in both the public and private sectors. A comprehensive marketing plan has been developed.

The long-range plans include the construction of part of Fort Calgary in 1875. This will be used for outdoor stage presentations and public gatherings. The redesign of interpretive programmes is also planned. Further development of year-round special events programming is aimed at creating a focal point for Calgary's festivals. An interpretive pathway system encouraging visitors to walk round the whole site is being created. These plans have been devised to encourage more people to come to Fort Calgary, to generate more revenue and to create greater self-sufficiency.

HERITAGE PARK SOCIETY/FOUNDATION (Calgary, Canada)

WHAT IS HERITAGE PARK?

> Heritage Park Historical Village was established in 1964 by a handful of Calgarians who recognised the importance of preserving a vital part of western Canada's history in a world of change.
>
> Initial funding from the Woods Family Foundation and the City of Calgary, as well as countless companies and individuals, helped to make this preservation a fact, and open Heritage Park to the local and international community.
>
> With 66 acres of rolling parkland, a dozen buildings, a mile of track and a restored operating vintage train, the Park opened on July 1st, 1964. Over the years, the Park has grown and developed, spurred by local popularity and support. Today, over 100 exhibits and over 40,000 artifacts depict the joys and traumas of the prairie pioneers.

(Heritage Park literature, n.d.).

> Heritage Park's activities vary with the seasons. From mid-May to mid-October the Park is open to the public as a historical village (representing western Canada up to 1914) with many special events. During the six weekends before Christmas, the shops sell crafts, Christmas trees are sold, and wagon rides are given. Throughout the winter, Sunday brunch is available at the Wainwright Hotel, and during the week, school programmes linked to social studies units are given. Year round, many functions take place such as weddings, conventions and company events. The Park often provides a historical setting for movies and commercial photo shoots.
>
> Finances are based on revenues generated by the Society, supplemented by grants from the City of Calgary. Heritage Park claims to be the largest historical park in Canada, based on its budget.

(Heritage Park Annual Report 1994)

GOOD PRACTICE

- Heritage Park actively promotes partnerships with local businesses, encourages donors and relies on volunteers to participate in the running of the Park.

- Advertising within the tourist industry is significant.

- The Park balances both educational and entertainment aspects to attract repeat visits from Calgarians.

- Frequent and effective use of the media is an important feature of promotional efforts. Displays of artifacts as well as costumed interpreters advertise the Park at other major events in the city throughout the summer.

- Financial policies are modified as funding decreases to boost the role of the Foundation, to encourage corporate sponsors, and to form the Heritage Club.

- The Park encourages community involvement, through volunteer opportunities, free admission or events, school programmes, summer camps, special events for enthusiasts such as Railway Days and the Fall Fair and the Twelve Days of Christmas.

- Seasonal activity provides income year round. Likewise, the Park's catering facilities are regularly used to increase revenue out of Park hours.

THE FUTURE?

In the immediate future, the Park plans to concentrate on such special exhibitions as Gasoline Alley to draw repeat visits from Calgarians. Many special weekends and events like the Fall Fair also achieve this end.

Financially, there is a move towards relying on the Foundation to manage the fund-raising for the Park (the Society).

In the longer term, a study has been made with the help of the Faculty of Environmental Design to develop the Park's Expansion Lands on the east slope outside the current park area. This may be used to create a newer village, perhaps from the 1920s onwards.

CONCLUSION

These nine case studies show the variety possible in historic preservation trusts. Each trust is unique, but each contains some common elements, methods and philosophies, which contribute to its success. Discussion based on these elements continues in more detail in the next chapter. Comments are made on whether a trust is the right vehicle to choose, the kind of trust which is effective, and the means of setting it up.

CHAPTER 4

SETTING UP A TRUST: RECOMMENDATIONS AND ORGANISATION

INTRODUCTION

Based on the case studies in the last chapter, the discussion continues with an examination of 'What Kind of Trust Works Best'. It describes factors that have been found to be successful for the majority of trusts working in the historic preservation field. 'What Kind of Trust? Recommendations' are delineated under: organisation, finances and tools. In Appendix III there is a step-by-step process for setting up that organisation in three stages.

WHAT KIND OF TRUST WORKS BEST?

The case studies in the previous chapter show that many forms of trust organisation work effectively. Some particularly strong characteristics may be noted, however, and utilised as good general principles, summarised from the examples of the case studies. Principles may not always be translated into practice, however, so discussion of problems and difficulties is included.

<u>Management practice</u>: For trusts with a general mandate, the pattern of a head office with spin-off groups maintains local control while taking advantage of expertise from the more established original trust. This creation of many small offices allows for creativity and innovation among the staff.

A trust with a specific mandate and one office should still maintain the flexibility to be innovative. A wide variety of personnel are used for the projects, from volunteers to school children, to extend the limited workforce. This encourages valuable community involvement. A large trust membership is likewise valuable both for the membership fees, and for strength in lobbying government. Membership will be increased if the trust is perceived to be planning for the long-term. A variety of projects will create interest and they will cross-subsidise each other which increases the stability of the trust. Each project creates many different problems so flexibility of approach and rapid action are essential. Sponsorship from business has always been appreciated by trusts, but partnerships with business are now emerging as a worthwhile technique.

Problems often arise in getting long-term commitment from volunteers running a trust. This can be alleviated by providing choice of activity and by maintaining a flow of projects with some feeling of achievement. If there are few achievements, membership will decrease. Attracting volunteers with the variety of skills and contacts that the trust needs can be a matter of luck. Stable, long-term planning can also be difficult until the trust is established. As in any organisation, all these potential problems can be turned into successes with strong and consistent leadership.

Setting up a trust is a balancing act between resources, funding, personnel and projects. If any one aspect is weaker than the others, the development of the trust will be limited. Sometimes a changing situation (perhaps in government or the economy) requires a change of policy. Building a trust's reputation requires effort and consistency of approach.

Funding: Obtaining funds from a wide range of sources is a necessity, especially as government funding decreases. Funding which also increases community involvement has long-term benefits. Using some capital or a grant as collateral to raise further financing has been effective. Public perception of a charitable body is generally positive, and this can aid fund-raising and donations. The taxation system may be targeted for change if it is not favourable. Some projects bring funding with them so trusts which obtain these projects begin with an advantage. Many trusts or foundations specialise in donating to other trusts involved in the arts, so this funding must be accessed. Creating a good reputation for financial management leads to more funds being donated to the trust. Borrowing ideas from business, such as the Ford VISA card, are effective. (Every time a purchase is made on the credit card, a contribution is made towards owning a Ford car.) Since 1991 the Landmark Trust has promoted a Mastercard which generates income for the Trust. Heritage Canada has the same scheme with Mastercard and the Bank of Montreal. In this case, every time you use the card, the Bank of Montreal makes a contribution to Heritage Canada. (Heritage Canada magazine, 1994:8) Also effective is a revolving fund, whereby restored buildings are sold and the capital reinvested in further restoration. Advertising the trust's needs and costs brings a response from the public. Costs can be kept down by applying for unemployment grants and using volunteer labour. Two organisations (one body for financial management, one for restoration) have been found effective.

As resources become scarcer, trusts have to become more innovative, dedicating more time, labour and expertise to fund-raising. This may put a strain on a volunteer organisation. Perhaps more of the trust's time has to be spent fund-raising than doing project work. The setting up of partnerships requires time devoted to making and maintaining contacts. The trust needs fund-raising experts who can network.

Balancing funding from different sources is imperative. If the trust cannot build a good financial reputation to attract these funds its future is in jeopardy.

<u>Community involvement</u>: This has been mentioned above in connection with available volunteer labour and increased funding. Apart from these aspects, information on local

conditions is essential. The introduction of school children to preservation values builds the next generation of preservationists. The introduction of businessmen to preservation ideas widens funding possibilities and increases partnerships. Valuable education techniques include introducing computer programmes to schools, creating training programmes, and instigating volunteer holiday sessions where the volunteers pay to work on projects. Use of the media, newsletters, exhibitions and meetings should be a common feature of trust work.

Once connections have been made with the community, they have to be maintained to be effective. Personal contact as well as regular newsletters are necessary. Annual events help remind the public about the trust's work.

Different factions within the community must be dealt with in a neutral way and included in consultation.

The limited labour force of most trusts makes such things as education programmes another balancing act between short and long-term priorities.

<u>Project identification</u>: Projects which bring funding with them have an obvious advantage. The completion of restoration projects to a high standard draws awards and acclamation,

making further projects more likely. The choice of high-quality personnel (staff or consultants), therefore, is important. Commitment to overseeing projects for the long-term increases a trust's reputation and public confidence. Likewise, projects must be chosen carefully to enhance the trust's reputation as well as to balance a profitable project with an unprofitable but desirable one.

Maintaining a balance of projects can be difficult. Labour availability and financial considerations often dictate other priorities. Threats to buildings are random and inconveniently-timed. One trust cannot take on all the work available. Projects sometimes have to be put on hold depending on the political situation, and taken up again later.

Often a small trust cannot undertake a large project, however desirable, and partnerships have to be made or the project dropped. This requires negotiating skills, confidence in the partners and long-term stability.

Having discussed both principle and practice, it can be seen that there are a lot of factors both inside and outside a trust organisation which influence its success. It is not possible to control all these factors, but the recommendations that follow should provide a framework for establishing good practice.

WHAT KIND OF TRUST? RECOMMENDATIONS

These recommendations are based both on the advice and suggestions of those currently working in trusts as well as on the previous discussion. The material has been grouped under three major headings: organisation, finances, and tools. It is hoped that a brochure or booklet containing the following information will be found useful by those working in the preservation field.

Organisation:

Create a small bureaucracy led, if possible, by professionals (planners, architects, environmentalists, educators, financial planners) with the freedom to be innovative.

Invite well-connected or expert directors to join the organisation. A sponsor or a patron (for example, a well-known actor for a theatre trust) on the board is advantageous.

Use a wide variety of personnel such as volunteers, the unemployed, secondment (borrowing an expert from a company or from local government, etc.) and school children as part of the trust's social welfare and training programme.

Encourage a large membership for lobbying pressure as well as membership fees and voluntary labour.

Work towards long-term planning and stability. This will give confidence in the organisation and a better decision-making ability.

Create a distinct focus or personal vision. Many of the most successful trusts are those which allow for this vision and provide the freedom for those professionals in the organisation to achieve this.

Have a variety of projects so that one project may support another, or large capital sums are not needed for every project. The workforce can be spread over a number of projects. The starting and completion dates vary, which will ease organisation.

Do not set a particular formula to deal with problems. Flexibility is a strength in these organisations where a variety of problems have to be dealt with on a regular basis.

Allow individual differences to emerge. In small organisations such as the local trusts, where only a handful of people manage the trust, individual strengths drive the projects. This ties in with creating a distinct focus or personal vision and allowing for flexibility in dealing with problems. Personal commitment is a vital force in creating success.

Expect to take rapid action. Buildings in distress are often lost because of delays in decision-making by the authorities involved. Eliminate these delays by gathering support and taking action.

Partnerships are increasingly seen as successful methods of operation. Partnerships between the private sector and business, for example, open up possibilities of sharing expertise, publicity, equipment and so on. Between trusts and schools, opportunities to educate the next generation and to train young people arise. Merchants' associations in programmes such as Main Street are invaluable. Volunteers and local community associations can take on useful supporting roles in preservation work with trusts.

Finances:

Obtain finances from as many sources as possible. It is increasingly necessary to keep income broadly-based. Government funding is decreasing at the moment and may vary with a change of government. Private sector funding may cover one project only, or may vary as the economy alters. Grants may be for a limited time or a specific project. Bequests may increase if publicity is favourable. Successful organisations have achieved a financial position where no one source of income is more than 10% of the total income, such as Groundwork, though this may not always be possible.

Plan funding to increase community development with high-profile parades, tours, dances, volunteer weekends, open houses, and so on. The more commitment the community has to the work of the trust, the more successful it will be. Recent programmes include working as a volunteer on a project for a week, and paying for the privilege of so doing (The National Trust, UK).

Use a grant to leverage funds from another source. With some capital acting as collateral and a vote of confidence from one source, use this capital as a guarantee of success and access further capital from other sources.

Charitable status confers many benefits. Benefits include tax relief for the trust and tax relief on any donations and bequests for the donors. As a charity, the trust can accept grants and donations from other charitable institutions and foundations.

The public's perception of a charitable trust is of an institution that has high moral standards and is using its funds for the betterment of society in some aspect. Thus the public is agreeable to donating funds to such an organisation.

A trust may lobby for taxation changes to benefit preservation in the long-term. An important role for a trust is to examine the legal basis of all preservation efforts and to work towards an improved system.

Find projects that bring resources with them. If, for example, grants from the local authority accompany a public building to be preserved, fund-raising and project financing will be simplified. Some projects may include unemployment funding, so that labour costs will be lower. Bequests may be tied to a particular building or area.

Try to achieve a good reputation for financial packaging which leads to further funds being available from government sources, etc. If the trust is known for its efficient financial management, more sources of funds are likely to open up.

Use other charitable trust funding as a resource. Many trusts rely on funding from other, perhaps older and more established trusts. Foundations exist to grant monies to worthy causes often in a particular field, such as the arts. These sources can be tapped.

Use ideas from business, such as the Ford VISA card programme whereby a percentage of sales is used for the preservation trust. The Landmark Trust uses this fund-raising method in England with Mastercard, and Heritage Canada has the same scheme here. Watch for other creative ideas from the business field.

Revolving funds are successful. Many trusts have found that the development and subsequent sale of a building has generated funds to do further preservation work. Capital is tied up for the short-term during the project and then released for the next project.

Advertise the trust's needs and costs in the newsletter as an opportunity for donation, and thank donors publicly. The Pittsburgh History and Landmarks Foundation recommends this method of fund-raising as being effective.

Use unemployment grants to subsidise labour for projects. These may be for the length of the project or for a certain number of months. Some retraining may be needed.

Set up a foundation or friendly society to manage financial investment and fund-raising for the trust, while the trust deals with project work. A two-tier system such as this may be more effective because it is more specialised (Manifold Trust/Landmark Trust, Heritage Park Foundation/Society).

Tools:

Local support is crucial. The trust needs the local community to provide funds, labour, information on local conditions, and enthusiasm. Constant use of the media, local people on the board of directors, fund-raising drives, heritage weeks, a plaque system on historic buildings, school programmes and so forth, all help to involve the community. Without local support, historic buildings will go unreported, vandalism will occur, there will be no media interest, few volunteers, and long-term projects will not succeed.

Educate the local population to take control of their own environment through the media, school programmes, training schemes, business connections, unemployment programmes, volunteer opportunities and networking.

Use prominent experts in the preservation field. The value of a well-known expert giving advice on a project should not be under-estimated. The media will publicise the project, interest will be generated, and funds will be donated.

Always promote high-quality restoration and design. The trust's reputation is a matter for constant consideration and with establishing a reputation for good financial management, as mentioned above, and an insistence on good design and high standards, the trust's path will be made clear.

Create a reputation for long-term commitment. With the reputation for good design and financial reliability should go the desire to stay in the preservation business for the long-term. This gives the public greater confidence in donating time and money to projects. After all, preservation, by its nature, is a long-term effort.
(Warburton & Wilcox, 1988; Main, Warburton & Wilcox, 1987; Bradshaw, 1989; Binney & Watson-Smyth, 1991)

CONCLUSION

This Master's Degree Project deals with a variety of trusts, the oldest of which has been in operation since 1957 and the youngest since 1990. They operate in Canada, the United States and Britain. Their concerns range from advocacy to restoration, property ownership to environmental clean-ups, and community involvement to publishing. The size of the trusts varies widely, from international to country-wide to one city and one area within the city. All the trusts work hard at financing, and this varies from obtaining the support of government and big business to selling hot dogs.

All these trusts are more or less effective. The increase in preservation activity over the last hundred years indicates that trusts are fulfilling an important role left at least partially empty by government. The public has stepped in to preserve buildings and landscape that is seen as valuable cultural property. The fact that the public takes responsibility for a large proportion of historic preservation and that this movement is gaining momentum is indicative of a new way of looking at government. Behemoths such as the National Trust (UK) have been under criticism since the 1960s for feudalism and lack of democratic principles. A hundred years ago, however, it was necessary to be part of the 'feudal' hierarchy in order to succeed. Today a different type of institution is being formed.

This is not to say that such institutions as the National Trust are outmoded. Despite its problems, it may provide a useful counterbalance to more recent and perhaps short-lived policies. Many institutions, however, are finding success in following more entrepreneurial policies.

Various factors affect trust work. The situation in which trusts find themselves is constantly changing. The political situation can change overnight. There are also three different countries to factor into these circumstances. The personal element is also important. Most organisations will be effective if there is dynamic leadership. The recommendations which have been made for trusts in widely differing situations, therefore, have been based on the practical experience of those working in the trust field during the last ten years.

To suggest a definitive trust model is presumptuous and impractical, as a wide variety of situations and personnel exist and are constantly changing. The guidelines given in this study, however, indicate methods and philosophies that many trusts have found to be successful.

APPENDIX I: EVALUATION METHODS

Evaluation can be described as the determination of value or worth, or the assessment of needs for services (Franklin & Thrasher, 1976:24). Theoretical frameworks such as criteria for success, cost/benefit analysis, models of organisations, and input/output evaluation help the process of evaluation. Choice of the method to use depends on the type of organisation you want to compare, the questions you want to ask, the results you want to achieve and how you want to use the results.

The elements of success are extracted in order to be applied to new organisations. The problem is that most measurements deal with quantity and most programmes are about quality. However a great deal of trust activity can be measured in terms of input and output. What did you do and how well did you do it? Output can be measured against the trust's declared goals and the effect of finished projects. For the trusts themselves, continuous evaluation is ideal, with an element of judgement always required.

In theoretical methods of evaluation, the comparison of programmes is admitted to be difficult (Franklin & Thrasher, 1976:154). The variables present, such as the changing nature of the situation (perhaps political or economic) during the study, the influence of completed projects on the nature of the organisation, comparison of projects with different goals and methods, all make standards hard to set. As Franklin and Thrasher argue:

> It is possible to get an indication of programme adequacy based on the judgement of experts -- the appropriateness of an organisation's structure to its function, the adequacy of staff size and composition, and the adequacy of accounting procedures are examples (Franklin & Thrasher, 1976:154).

Greenstein and Polsby describe case study methods and comparative study. They explain that the experimental studies, concerned with large numbers of cases (such as population samples) are extensive, while clinical studies deal with small numbers not statistically representative, and are intensive. The experimental study has a tightly constructed research design, while the clinical study is more open-ended and flexible at all stages. The clinical study, which is more appropriate to this Master's Degree Project, contains ideas of where to begin the inquiry, a checklist of points or perhaps a preliminary model of the organisation being studied. Techniques involve improvisation, participant observation and empathy with the subjects studied. The findings are generally narrative and descriptive, with case histories which provide an overview or holistic view of the subject, with interpretation. While experimental study concludes in generalized knowledge and theory, clinical study aims to capture the particular, as representative of the whole. The object of clinical study is to define action objectives and policy rather than pure knowledge (Greenstein & Polsby, 1975:81-2).

In order to find a framework with which to compare the trusts, let us examine the experience of those working in trusts and those writing about trusts. Few studies have been made on the comparison of trusts, but from Creating Development Trusts (1988, London, HMSO) and Regeneration: New Forms of Community Partnership (1989, London, Civic Trust), and from individual information from the trusts in question, some framework for evaluation emerges, as follows.

Groundwork's evaluation methods

The Groundwork Trust (UK), working in the environmental field, improves industrial sites, playgrounds and countryside around major urban areas. It uses quantitative data such as: environmental improvements, partnerships with other organisations, involvement with local residents, work and job creation, public awareness, education and training in environmental preservation. Data are collected for areas improved, costs involved, numbers of people and organisations affected, numbers of jobs created, numbers of articles published in the press, etc. The data clearly show what has been achieved in physical terms. Groundwork freely admits, however, that the quality of each project is much harder to judge. The process is not evaluated. The value for money is not assessed. The relevance of the project to the area is not checked. Quality can only be a subjective measure of success or failure.

These comments draw attention to the difficulties trusts have in forming an evaluation system:

In speaking at the Operation Groundwork Conference (July 20-22, 1988) Professor Noel Boaden of the University of Liverpool discusses evaluation criteria, which he believes are problematic:

> Aims and objectives are quite easy to establish and were written into Operation Groundwork from the outset. The criteria by which you evaluate their achievement are more problematic and certainly any measurable base for

> evaluation is fraught with difficulties (Bradshaw, 1989:14-18).
>
> Certainly the search for quantification can be misleading. Hectares recovered from dereliction or treated in particular ways, or volunteer hours worked in any month or year, fall far short of telling the necessary story. Some ground is harder to cover than others and the qualitative and coincidental benefits of volunteering cannot really be measured. So there is a problem (Bradshaw, 1989:14-18).

When speaking of funding constraints and the learning

experience the staff had to go through, he says:

> It would have been better had they been able to simplify the games so that others could play them more easily.....One evaluatory measure of the project is whether it changed that external system...but the external system has got a lot harder in the five or six years of the project's life (Bradshaw, 1989:14-18).

He goes on to say that perhaps the existence of the Conference as a 'measure of effect' proves Groundwork's success, and:

> More to the point and much more significant would be the survival of the project and its continuation into the future. That is certainly one measure of success but only if survival is intended, which ought perhaps to remain an open question (Bradshaw, 1989:14-18).

Groundwork is now moving on to an annual evaluation of its business plan, which 'states the objectives for the individual trust and the programme of work that will be undertaken over three years to achieve those objectives, as well as the targets for each year which can be used to assess progress' (Main, Warburton & Wilcox, 1989:26). The aim is to concentrate resources on the objectives.

Professor Peter Jones notes (in 1995) that 'new performance measures are now being introduced, designed to help demonstrate the effectiveness of Groundwork activities to national stakeholders like central government, large business organisations and the Countryside Commission.' While individual trusts are encouraged to develop their own measures, Groundwork's annual returns are devised 'to cover strategic aims, including land reclamation, sustainable resource management, public participation and the community management of projects, working with the business community, the development of new services by trusts, and the promotion of the benefits and achievements of the Groundwork approach' (Jones, 1995:56).

He suggests that funding raised as a ratio of local authority core funding could indicate good value for money, or the number of school children involved compared with the total number of school children in the area could indicate education success (Jones, 1995:56). The measurement of effective working partnerships, the combination of economic, community and environmental goals, the stimulation of development and conservation, and the flexibility to adapt to local conditions are all vital to Groundwork's operation, and yet much harder to measure.

Robson & Robson's evaluation experience

Professor Brian Robson (Department of Geography at the University of Manchester, UK) and Glenna Robson (a member of the Moss Side and Hulme Women's Action Forum) describe the essential elements of a successful community-based enterprise in their experience. These elements should be looked for in a trust evaluation:

- a central vision to provide a focus to galvanise activity;
- local leadership and the involvement of local people to ensure an informed understanding of problems in localities and of ways best to tackle them;
- partnership across the many public and quasi-public agencies operating in inner areas, allied with a readiness to search for funding from a variety of sources to reflect the multi-faceted nature of problems;
- persistence, and the recognition that regeneration is a long haul with few short-term results;
- financial pump-priming and front-loaded resources through which initial ideas can be worked up into larger ventures.

(Robson & Robson, 1994:91-93)

Monaghan's evaluation experience

Angela Monaghan (Director of the Development Trusts Association, UK) notes that successful development trusts contain certain basic elements which may form a framework for evaluation:

- Elements such as genuine community support and involvement;

- A healthy asset base capable of generating income into the long term;
- Independence from any one local interest (particularly political);
- A willingness to behave entrepreneurially and take risks;
- Strong commitment to meeting local needs;
- Local accountability;
- A clear, long-term strategy (not just short-term expediency);
- A versatile, skilled staff team.

(Monaghan, 1994:89-90)

Warburton & Wilcox's evaluation methods

In Creating Development Trusts: Case Studies of Good Practice in Urban Regeneration prepared for the Department of the Environment by Diane Warburton and David Wilcox of Partnership Ltd., UK, the authors study nine trusts in depth and undertake six shorter case studies. The trusts under consideration are principally in urban development but this includes historic preservation in many cases (the Ironbridge Gorge Museum Trust and the Wirksworth Project), the urban fringe, small town development, cultural events, renovation, and interpretation of heritage.

These fifteen trusts were chosen because they had been in operation for at least three years and had 'substantial achievements on the ground' which indicated success and efficiency. The authors also looked for a 'high proportion of urban trusts, a regional spread, and a range from small to large scale'. The six short case studies were of trusts which were achieving successes, but did not fall within the above criteria. (None of these trusts has been included in this Master's Degree Project, although mention is made of the Ironbridge Gorge Museum Trust and the Wirksworth Project, Derbyshire).

Based on their previous experience in working with trusts, the authors analyse elements of 'good practice'. These elements, therefore, have a practical rather than a theoretical base. The authors state:

> No-one has defined what is a good development trust. Good practice is often easier to sense (it's working well) than evaluate objectively. There is no general currency for discussing good practice in trusts (as distinct from, say, good practice in small business, architecture or environmental improvement) - no framework for "objective" criteria. There is, however, a general

> philosophy and some rules of thumb about what works and what doesn't (Warburton & Wilcox, 1988:15).
>
> Analytically, good practice in trusts is itself difficult to define because good trusts are concerned with both physical and social change, and the less tangible but important spirit of an area. They aim to improve places, but fail unless they do this by releasing local commitment. They require champions in the public sector, but depend for success upon staff adopting a flexible and opportunistic style (Warburton & Wilcox, 1988:3).

A definition of good practice should cover the diversity of trusts, all of which have substantial achievements in different fields. Good practice for trusts can be described as 'the ability to use their special characteristics to produce value for their sponsors, the people in the area, and the trust itself' (Warburton & Wilcox, 1988:15). Value is dependent on the individual's perspective. Is that historic building valuable for tourism, preservation of a tangible cultural identity, economic return, job creation or revitalisation?

In brief, Warburton and Wilcox group the discussion of good practice under four major headings because they feel these areas are particularly important:

1 The structure and organisation of a trust (management practice);
2 The aim of achieving long-term financial sustainability (funding);
3 Community involvement;
4 Project and programme identification.

(Warburton & Wilcox, 1988:15)

APPENDIX II: TRUST STUDIES

CIVIC TRUST (Britain)

Credo:	"To ensure that people everywhere have the best possible living and working environment. To care for the places which form the backdrop to everyday life." "Keep it simple and avoid bureaucracy." "Independence, commitment, professionalism, open-mindedness, cost-effectiveness, readiness to help anyone." (Civic Trust literature, n.d.)
Legal Description:	Independent charity
Date of formation:	1957
Origin:	An initiative of the late Lord Duncan-Sandys.
Head office:	London
Workforce:	Professionals, consultants, volunteers, local authorities, communicators, educators, business and industry
Funding:	Government grants UK2000 Logo poster, sponsorship, membership, covenants, sale of publications, professional fees, trust projects
Budget:	(No information available)
Major projects:	Regeneration Unit, 1987 (a branch of the Civic Trust to aid inner city revitalisation) Amenity Societies (over 1200 local societies formed with the assistance of the Civic Trust to look after local historical preservation) National Council of Civic Trust Societies, UK2000 Logo poster (50 companies) Project Grant Fund, Architectural Heritage Fund, Heritage Centre, Build a Better Britain exhibition, European Architectural Heritage Year (1975), Education Group, Alleviation of traffic problems, Campaign for Liveable Places, Centre Vision campaign for high streets, BT Environment Week, annually in May, Winning Partnerships workshops, GrandMet Inner City Action Scheme (CTRU)

ANALYSIS OF THE CIVIC TRUST

Management Practice: With a mandate so general ("to ensure that people everywhere have the best possible living and working environment") there might be a danger that the trust lacked direction. In fact, the mandate has left the trust open to follow its goals of "raising awareness and standards, demonstrating through practical example and developing a community voice" (Civic Trust pamphlet, n.d.).

The Civic Trust was one of the first organisations to recognise and respond to the decay of communities in the inner cities. Based on its experience in Wirksworth and Halifax, where it had undertaken discrete revitalisation projects, the trust created the Regeneration Unit in 1987 to deal with these problems in over forty towns. This indicates its ability to build on experience and respond to needs.

The management style allows the trust to be responsive also to individual enquiries, which can start a new project. It has no set formula to deal with problems. Despite its comparative age (founded in 1957) it retains the characteristics of a youthful organisation: adaptability and responsiveness. It avoids bureaucracy, according to its credo. Its mandate remains wide and it remains very much an enabler and guide, working through the system of amenity societies and partnerships.

The trust sets long-term initiatives (the European Architectural Heritage Year, the Architectural Heritage Fund, the Education Group) and aims to put machinery in place to secure future opportunities. In 1966, for example, it promoted legislation which resulted in setting up conservation areas in Britain which now number 8,000.

It consistently demonstrates high quality in its projects, and together with setting standards through its extensive award system, creates an example for others to follow.

Funding: The Civic Trust has obtained a wide range of financial resources: it has no endowment or government subsidy, but government grants are used, while the remaining funds are from business and the private sector, trust projects and members. It has a stable resource base.

Innovative ideas such as the UK2000 logo poster combining logos from fifty businesses, help to raise funds, to create exposure and to form partnerships. The UK2000 Project Grant Fund is a national environmental partnership of six voluntary organisations (including Groundwork) which provide expertise to local groups. Funds come from the Department of the Environment, private sector sponsorship and the poster. Three hundred thousand pounds are now available for grants per year (Civic Trust literature, n.d.).

The GrandMet Inner City Action Scheme is sponsored by Grand Metropolitan plc, an international food, drink and retailing group (Civic Trust literature, n.d.). The Centre Vision programme is sponsored by Boots The Chemists at one hundred and twenty thousand pounds, to revitalise town centres and high streets (Urban Focus Civic Trust newsletter, Winter 93/94). These projects are similar to Heritage Canada's Main Street programmes, but business sponsors are providing the funds.

Funds for the Regeneration Unit come from three main sources, the central government, private sponsorship and fees.

The Trust assists local organisations to access funding through government and grant-making bodies (such as the Architectural Heritage Fund or Local Projects Fund) by providing the contact information and guidelines.

These funding liaisons are one of the strengths of the Civic Trust. It provides networks and acts as a catalyst for others.

Community Involvement: Strong community involvement and assistance is a guiding principle for the trust. For example, in Wirksworth, Derbyshire, the Civic Trust based one project leader in Wirksworth for three years to establish the revitalisation process, working with the community.

The trust has assisted in the setting up of Local Amenity Societies (about 1,200, with 300,000 members) to carry out local preservation work. The National Council of Civic Trust Societies (1991) represents the societies' interests to government, authorities and the trust.

The Trust has created partnerships with the local authorities, business and sponsorship initiatives with companies. Major British companies such as Shell, Boots and British Telecom are sponsors. The Trust also provides partnership workshops to assist the process.

Emphasis is upon exhibition work (Build a Better Britain and National Environment Week) on a national scale. Publications and an award system also contribute to the trust's effective, regular communication.

Project identification: The Civic Trust has led the way in choosing a wide variety of projects. It has shown that a blend of goals can be achieved, from restoration of buildings to environmental work, from urban design to the clearing up of decaying industrial sites. This demonstration of such a wide mandate led the way for the creation of such trusts as Groundwork, which links environmental work with restoration of buildings.

Restoration is linked with revitalisation. A recent development has been to encourage use of the space above shops in urban areas, which is clearly the identification of an under-utilised resource. The Civic Trust is therefore active in seeking new opportunities.

The problems seen in British cities, such as traffic congestion, decentralisation of retailing and population, and decay of older buildings can just as well be seen in Canada. 'The Liveable Towns and Cities Report' has recommendations which can apply here also. The Civic Trust is active in both seeking out and solving problems (Urban Focus, Civic Trust newsletter, Winter 93/94).

The Trust has been instrumental in establishing conservation areas throughout Britain. The problem now arises that certain areas are no longer being kept up and the Trust is concerned that the Government's new draft policy guidance on Historic Buildings and Conservation areas fails to take a pro-active role in maintaining preservation (Urban Focus, Civic Trust newsletter, Winter 93/94). The Trust must continue to monitor government attitudes towards preservation, which allow for the negative dynamics of economic decline. The government is also putting less emphasis on the importance of preserving listed buildings. The Civic Trust continues to educate government in the importance of heritage to tourism, specialist retailing and urban regeneration.

GROUNDWORK (Britain)

Credo:	"To show that neglected and forgotten countryside in and around a major urban area could be brought back to life for recreation, food production and the benefit of the local community as a whole." "To improve attitudes towards greening the urban landscape, to improve environments and create enjoyment and prosperity." "To bring about positive and long-lasting environmental improvements throughout the country." "As environmental entrepreneurs, our aim is to build up a network of small businesses which earn their income by helping solve some of Britain's most pressing problems." (Groundwork literature, n.d.)
Legal description:	Charitable trust and foundation
Date of formation:	1981
Origin:	Initiative from within the Countryside Commission (national government)
Head office:	Birmingham (now over 30 Groundworks)
Workforce:	Professionals, volunteers, local authorities, researchers, educators business and industry (secondees), trainees
Funding:	Department of the Environment Countryside Commission Manpower Services Local authorities Donations, memberships, charitable trusts, professional fees, campaigns, profits from projects (no source of income is more than 10% of budget)
Budget:	Original Groundwork only: 340,000 pounds (1989)
Major projects:	Project Monitoring Group, Brightsite (with Shell), Inner Vision (with Barclays Bank), Right Connection (with British Telecom), Environmental Management Training

ANALYSIS OF GROUNDWORK

Management practice: Groundwork sees itself as "environmental entrepreneurs" (Groundwork Status Report for Industry Year 1986) which indicates interest in grasping opportunities. Groundwork's key to organisation is freedom for individual differences and this results in a dedicated workforce. The small number of staff means each person carries a lot of responsibility and their particular methods of working have helped to shape the organisation.

It is not dissimilar to the Civic Trust, acting as a catalyst and starting with a single unit, then creating spin-off Groundworks around the country. The Civic Trust and Groundwork, in fact, work as partners in the UK2000 programme. Groundwork follows the same blend of mixing environmental concerns with building restoration, although the latter is of less significance.

Funding: Groundwork was originally based on tapering funding from the national government and had to become financially adept during heavy project work. Funding limited core staff to three people for five years, but initiative has resulted in success at getting varied sponsorship and finding projects that brought funding with them.

Groundwork aims to remain small and flexible to keep down overheads (John Iles, Director of Trust Development, Status Report for Industry Year, 1986). Complete self-sufficiency is impossible despite revenue generation in areas such as landscaping or property rehabilitation services (John Grayling, Status Report for Industry Year, 1986).

Groundwork encourages a variety of financial partnerships through: commissioning its professional services, buying Groundwork publications, inviting Groundwork members to talk to companies, making donations in kind, lending spare plant or equipment, volunteering time, seconding a member of staff, making a cash donation, making a covenant or legacy, and publicising involvement with Groundwork in newsletters and annual reports.

Community involvement: Groundwork has initiated a training programme with the university extra-mural system. This programme and a trainee scheme are Groundwork's strengths in furthering environmental work in the future. "With its commitment to environmental regeneration and improvement in and around our towns and cities, Groundwork is not simply greening the urban landscape, but also reshaping attitudes towards it" (The Rt. Hon. Christopher Chataway, Chairman of Groundwork, Groundwork literature, n.d.).

Partnerships and volunteer work involve communities, business, volunteers, schools (Friends of Operation Groundwork, FROGS and local government, and this is an important part of Groundwork's success. Working with businesses, it provides trained manpower and landscaping expertise to ensure the business gets value for money.

Partnerships have been made with IBM to provide computers for schools and to give business management training. Esso, Natwest, British Gas, Ciba-Geigy, Shell UK, Pilkingtons and Marks and Spencer have all provided skilled staff for projects. The Commercial Union insurance company wanted an environmental programme to run alongside the restructuring of its general insurance offices. Bristol Avon Groundwork has a long-term financial partnership with the Wincanton Group over five years. A connection between the image of the company and the benefits the trust provides, can benefit both parties. "Themed campaigns, conducted over a set timespan and involving thousands of ordinary people, are an ever-more attractive proposition to businesses hungry for heightened public profiles" (Groundwork Today newsletter, Issue 13, 1990).

Connections are also being made with Japan, France, Holland and Czechoslovakia. This international exchange where delegations are coming to learn from the work of Groundwork leads to opportunities of loaning an expert to specific projects, and the integration of policies and methods of conservation.

Groundwork's Environmental Management Trainee scheme at Manchester University was so popular that in 1992/3, the 21 vacancies attracted 1,400 applications (Groundwork Today newsletter, Issue 19, Winter 1992). Groundwork is clearly catering to an important need.

An interesting development in this training field has been the creation of the Environmental Trainers' Network, with the goal that "progress on improving the quality of training in environmental organisations will be made more quickly and efficiently by increasing communication among those responsible for it" (Groundwork Today newsletter, Issue 19, Winter 1992). A bulletin has been produced and a resource base started. Members of NEST (National Council for Voluntary Organisations Environment Support Team) include the National Trust, the Groundwork Foundation and UK2000, among others.

Groundwork is active in promoting its work through a newsletter, school programmes, youth groups, campaigns and Greenlink, a computer system linking 14 trusts with schools and businesses. Five thousand children took advantage of this system in 1992.

Project identification: Groundwork has been able to choose a variety of projects, such as school playgrounds, which would not have been undertaken by commercial enterprises. This is possible through the cross-subsidy from other projects. This type of project plays a vital role in educating school children in environmental improvement in a practical way. It is also a small project easily capable of success. In contrast, some projects that Groundwork undertakes include such complex and long-term efforts as cleaning up and beautifying industrial sites. Whether cross-subsidy from profitable to unprofitable projects can be maintained in the future as funding becomes more difficult, remains to be seen.

The environmental clean-up required in Britain is extensive, so Groundwork has no shortage of work. In the eighties, Groundwork completed more than 3,000 environmental projects in five years, with more than 3,000 organisations and fifty local authorities (Looking to a Greener Future, Groundwork literature, n.d.).

LANDMARK TRUST (Britain)

Credo:	"To rescue buildings in distress then try to revive them and give them a new life." "We are trying to preserve and restore not only the buildings, but also the outlook on life which created them." (Landmark Handbook, 1989:6-7)
Legal description:	Charitable trust
Date of formation:	1965
Origin:	Personal initiative of Sir John Smith
Head office:	Shottesbrooke, Maidenhead
Workforce:	Director, 8 trustees, 12 full-time staff, 8 part-time; local secretaries, caretakers, builders, decorators, volunteers
Funding:	74% from the Manifold and other trusts English Heritage Rural Development Commission Local authorities Business and industry Donations, legacies Campaigns Landmark Trust Mastercard 20% visitors' rental Architectural Heritage Fund 6% grants
Budget:	No information available
Major projects:	Ongoing acquisition and restoration of properties, restoration of furniture, design and printing of fabrics, Landmark Handbook (describing the nearly 200 properties)

ANALYSIS OF LANDMARK TRUST

Management practice of Landmark has a very distinct focus, based on the personal vision of its founder, Sir John Smith. Landmark has modelled itself on the National Trust's system of renting out historic houses (800, to date) all over Britain. Some Landmark properties are let on a long lease, but the majority are available to the public for self-catering holidays.

Planning has always been long-term. The sympathetic re-use of buildings has been a concern, together with the least disruption to the community possible.

High-quality restoration has always been a priority, by a small team of enthusiasts who have been with the trust for years.

Funding for Landmark depended upon the success of the Manifold Trust which was started first. Landmark is heavily reliant on the Manifold Trust and government grants. Rental income covers only 20% of costs. A new initiative is the Landmark Mastercard (1991) by which a percentage of purchases is donated to the trust.

In 1991 the Silver Jubilee Appeal was made, with the sale of a special edition plate. Doubts about continuing funding from the Manifold Trust were evident, and funding was indeed below 1990 levels. As grants amount to only 1% of expenditure (in 1989), Landmark began to make approaches to other charitable trusts and grant-making agencies. Sponsorship and advertising were also being considered. Membership fees are a resource for many trusts, but Landmark feels that the increased administration required would make the idea unfeasible. Landmark encourages donations, gifts and legacies (1991 Newsletter).

Funding is inadequate for the many projects that are offered to Landmark, so less is being achieved than is possible.

Community involvement was not a priority with Landmark in the past. However, Landmark now involves an increasing number of volunteers for such things as landscaping. Volunteers are also put to work in the main office at Shottesbrooke. The trust now holds open days at its properties as a promotional fund-raiser. These have increased from four days in 1990 to nine in 1993.

Volunteers turned up in numbers too great to accommodate when a weekend's work at Wortham Manor in February 1992 was scheduled. Landmark has recommended that further opportunities for volunteers to learn specific conservation skills are available through the British Trust for Conservation Volunteers.

There is sensitivity to the local community reaction to restoration and re-use of Landmark buildings. Local labour is used where possible.

Partnerships are limited to the Manifold Trust and local authorities throughout Britain, in Vermont, U.S.A., where Landmark owns Rudyard Kipling's house (Naulahka), and Vicenza, Italy, where it has a Palladian villa (Villa Saraceno).

The Landmark Handbook describing the properties available for rent, and a quarterly newsletter, comprise the written material available. Open houses at properties are increasing promotional efforts and Landmark is occasionally written about in magazine articles, which produce a sudden increase in bookings.

A Silver Jubilee Exhibition of photographs was held in 1991 both in Edinburgh and London.

<u>Project identification</u>: Choice of projects is both pro-active and reactive. Landmark considers projects all over Britain (the U.S.A. and Italy are exceptions) which are entirely different in nature, from castles to follies, cottages, railway stations, water towers and Martello towers. The majority of these properties are rented out to the public and therefore must have some habitable space and amenities. Projects are of varying sizes and locations and provide a wide choice of holiday experience for the visitor. The concept has proved very popular and bookings have to be made far in advance. This success has enabled Landmark to increase the number of its properties considerably in the thirty years of its existence.

Landmark has found a niche in the historic preservation market which it fills very successfully. Its growth has been steady, and in one direction, unlike the Civic Trust and Groundwork which are very diverse. Landmark has been restricted by funding restraints. Its partnerships are limited. No spin-off groups are considered, as with the Civic Trust and Groundwork. More of the same is the best recipe. Education of the public is subtle and understated. The historic experience is the thing.

SAVE Britain's Heritage (Britain)

Credo: "To campaign publicly for endangered historic buildings." SAVE places special emphasis on the possibilities of alternative use for historic buildings and sometimes prepares its own schemes for re-use of threatened properties.
SAVE has persuaded owners to sell empty buildings. SAVE is active on the broader issues of preservation policy.
(SAVE Action Guide, 1991)

Legal description: Registered charity

Date of formation: 1975

Origin: As a result of the European Architectural Heritage Year, by a group of journalists, historians, planners and architects.

Head office: London

Workforce: Committee, Friends of SAVE

Funding: No regular grants from public or private sources
Friends of SAVE
Supporters include:
The Monument Trust,
the Ernest Cook Trust, the Arts Council of Great Britain, the Leche Trust, the Department of the Environment, the American Express Foundation, the Manifold Trust, the Yorkshire Tourist Board, the Baring Foundation, the Prince of Wales' Committee

Budget: No information available

Major projects: A series of major buildings saved from demolition, Billingsgate Fish Market, Battersea Power Station, Calke Abbey
SAVE set up two charitable trusts for Barlaston Hall, Staffs., and All Souls Church, Halifax. SAVE has created shop-front guidelines, over 100 publications, organised a campaign for the introduction of the 'thirty years rule' (outstanding buildings over thirty years old can be listed), and exceptionally, buildings ten years old.

ANALYSIS OF SAVE Britain's Heritage

Management practice of SAVE uses high-profile experts for their publicity value. It believes in rapid action as being essential, and it reacts to information from the public. SAVE acts as informer, catalyst, negotiator and goad and has earned itself a substantial role as public spokesperson.

It began as a group of young people determined to halt the rampant demolition in England of one listed building per day in 1975. The situation called for drastic measures and strongly influenced the type of organisation that was set up.

Response to mayday calls from the public is still a main function of the trust. It also deals with the legal problems involved in decaying buildings whose owners do not want restoration. This has meant that SAVE has learned how to deal with a variety of problems.

SAVE focuses on architectural heritage, from markets to country homes, and from garden follies to street façades. There are no spin-off groups, though SAVE encourages people to take action themselves.

Funding: SAVE survives quite unusually with no regular grants, depending on a wide range of resources both public and private. It relies on the Friends of SAVE and on the sale of a range of publications. This has enabled it to stay in operation for twenty years.

Community involvement: SAVE uses the public effectively as a watchdog and alarm system on conservation matters and encourages the public to start action groups by providing guidelines.

Communication is a strength of SAVE. It is particularly efficient at rapid press releases. SAVE produces books, leaflets, reports,and exhibitions. It attacks all aspects of heritage problems: tax legislation, apathy, and physical decay. SAVE threatens legal action if necessary, with effective results.

Project identification: Much of SAVE's work is response to public calls for help when buildings are threatened. When projects have been successful, SAVE has assisted in starting trusts to manage the building in question. It is not a property owner or manager itself. It both takes on preservation causes and educates the public to take on causes. Even when a particular cause is lost to the demolition ball, the education process that has resulted is not lost. SAVE is attuned to the legal problems that lie behind many threatened

buildings, and gears its methods to dealing with these problems, and to changing legislation. It believes in constructive alternatives and works as a catalyst to achieve these aims.
Personnel from SAVE have become major figures in the preservation, museum and media fields.

SAVE's first report was a manifesto (1975) cataloguing and illustrating the losses, threats and success stories. It included a list of recommendations, one of which was the creation of a new statutory historic buildings committee. This was established by Act of Parliament as the Historic Buildings and Monuments Commission for England, known as English Heritage, nine years later (Binney & Watson-Smyth, 1991:11).

SAVE is satisfied that its original aim of creating awareness has been achieved to the degree that buildings cannot now be demolished without public knowledge and concern.

PITTSBURGH HISTORY AND LANDMARKS FOUNDATION (U.S.A.)

Credo:	"To promote historic preservation in Allegheny County." "To increase awareness, improve the equality of life in the inner city, to educate, to create major developments that contribute to the economy, to demonstrate economic benefits, to promote Pittsburgh as a tourist destination, to influence through advocacy" (PHLF literature, n.d.).
Legal description:	Non-profit historic preservation organisation
Date of formation:	1964
Origin:	Formed in response to a threatened housing block in Liverpool Street, Pittsburgh
Head office:	Pittsburgh
Workforce:	Trustees, staff, interns, 200 volunteers members
Funding:	Business and industry (no government support) Membership, donations,legacies Charitable trusts Sale of publications and books Annual Antiques Show (for 16 years)
Budget:	No information available
Major projects:	Technical and financial assistance to restoration programmes, educational programmes, liaison with cultural institutions, historic properties management (4), planning, advocacy, Station Square (52 acres), James D. Van Trump Library, The Landmarks Store, Antiques Show, lectures, tours, publications, award programme

ANALYSIS OF PITTSBURGH HISTORY AND LANDMARKS FOUNDATION

Management practice of this trust maintains a long-term strategy with clear objectives, for example, Station Square has been organised in three phases: 1976-1993, 1993-2008, 2008-onward. This builds confidence with the result that donations are more forthcoming. Successful management of a complex landmark project (Station Square) and high-quality restoration has established an excellent reputation for the trust.

Arthur Ziegler had an strong influence on the formation of the trust. Such achievements as overcoming the hostility of the Pittsburgh Urban Redevelopment Authority and cementing ties so that the Foundation, the city government and the URA work together, are substantial.

Ziegler believes that 'a preservation leader has to run his organisation with the willingness to go out of business tomorrow if he can't make it. As soon as he or she decides to play it safe and starts hiring a lot of consultants to remove the burden of decision-making from his shoulders, he is done for. If an organisation sees what can be done and believes in it, and assumes the responsibility, it can do tremendous things. You've just got to get out and do it' (Reed, 1979:124-5).

'How does the undoable become the done? Two things are needed, says Ziegler. First, the project needs "a special sense of turf on a large scale, with firm master control -- the EPCOT principle." Second, the city in itself needs angels -- "seed money of $200 to $400,000 from city government, a businessmen's organisation, a foundation; from there subsidy capital -- either grants, government loans or interest write-downs from banks. You cannot do this kind of thing borrowing at prime"' (PHLF literature, n.d.).

Ziegler remains the president of PHLF but is involved mostly with Station Square and general policy, while the PHLF has changed direction to focus on education and technical assistance.

The instigation of programmes in phases has been a hallmark of the Foundation. The beautification programme in 1967 in Birmingham, a South Side blue-collar neighbourhood, led from planting window boxes to cleaning streets and vacant lots, and fixing up the houses. Then the PHLF organised local financial institutions to create a high-risk rehabilitation loan fund which grew to $1 million. This prompted the federal government to create Neighbourhood Housing Services, a public-private revitalisation programme. The largest PHLF project is Station Square, which has been planned in three phases, one phase subsidising the next, and net income going into a fund for the continuing restoration of inner-city neighbourhoods.

These major projects were organised with a staff of as few as eighteen in 1979, doing all design, construction management, promotion, advertising, graphics and leasing for Station Square (Reed, 1979:123).

Funding: The trust has a lively and effective management of funds. The Pittsburgh Restoration Fund began with grants from local foundations ($200,000) which grew to $500,000 by 1973. Its strategy was to buy a key building, and restore it to provide a model and magnet for reinvestment in the neighbourhood. The original revolving fund is now expanded to a 'Preservation Fund' providing loans and technical assistance to preservation groups and individuals.

PHLF believes in advertising its needs through the newsletter, as well as thanking donors publicly. Communication has proved a key to funding success. The trust has 71 corporate members as of 1993 (PHLF literature, n.d.).

A mix of funding has been successful for the Station Square project: an initial $5 million from the Allegheny Foundation, substantial private investment, and a loan which has been repaid,
thus establishing the trust's financial responsibility. Income is derived from the three million people who annually visit the shops, hotels and restaurants that the trust restores and full taxes are paid (approximately $6 million in 1992), (PHLF literature, n.d.).

PHLF works towards liaisons between lending institutions so that in 1993 there was $700M available for mortgages and loans (PHLF literature, n.d.).

The PHLF has used its charitable status to the full and has established a sound reputation financially so that extensive funding sources are available, mainly from other foundations. It has created revenue-generating projects. Sponsors are publicly acknowledged and projects named after them.

Community involvement is evidenced by a commitment to housing and neighbourhoods, although this has been gradually adapted to an interest in education as a link to the community. The large Station Square project is seen as a revitalising force in Pittsburgh.

Approximately 200 volunteers are involved in PHLF work.

Promotion and communication is achieved by presentations and lectures. Tours are offered to the public. Courses in continuing education, teachers' courses, and a Hands-on History Festival all help to promote the work of preservation. A newsletter is sent out five times a year. Effective and consistent communication techniques are used.

The PHLF believes in encouraging local pride in Pittsburgh through revitalisation and with the highly-visible Station Square project these aims can be achieved. The project is designed for public use with the result that interest in preservation is heightened.

Project identification: The Foundation was created in response to a threatened housing block in Pittsburgh in 1964. Many small projects proved successful so that by the mid 1970s, it had the experience to tackle the enormous Station Square project. This project has become the flagship of the Foundation and its success has increased awareness of the PHLF and preservation values. This will continue as the project is planned into the next century. Despite the size of the Station Square project, the Foundation maintains a balance of projects in its festivals, shop, tours, property management, planning and advocacy, award programme and so on. By having such a wide range of projects, the Foundation has achieved its aims in increasing awareness, in promoting preservation, increasing tourism and improving the economy.

Certain aspects of the Station Square project have been questioned by members of the PHLF, such as the building of a Sheraton Hotel in the complex. With hindsight, this decision would have been altered. However, each project contains many lessons for the preservationist, and the PHLF can take advantage of this process because of its policy of planning in stages.

OLD STRATHCONA FOUNDATION (Edmonton, Canada)

Credo:	"To enrich the social, cultural and commercial life of Old Strathcona while honouring its past." "To undertake and finance carefully selected restoration and renovation projects." "To encourage businesses and residents to restore their own historic premises." "To develop an historic streetscape characteristic of Old Strathcona" (OSF literature, n.d.).
Legal description:	Registered non-profit volunteer organisation
Date of formation:	1974
Origin:	Following the Strathcona Historical Group (1972)
Head office:	Strathcona, Edmonton
Workforce:	Voluntary Board of Directors (19) Nine communities Members (452 in 1992) Volunteers
Funding:	City of Edmonton ($10,000 p.a.) Promotional campaigns Princess Theatre operation ($121,000 net in 1992) Rental income Bingo, casino, grants, membership Income: $314,191 (1992) Surplus: $50,433
Major projects:	"End of Steel" park planning (Centennial project), McIntyre Fountain, Tourist information centre (caboose), annual summer parade, annual street dance, Christmas parade, Dominion Hotel reconstruction, Strathcona Library renovation, Whyte Avenue Building Improvement Programme, Farmers' Market, Merchants' Association, Strolling Players Walking Tours, Alberta Historic District Feasibility Study, The Old House weekend workshops

ANALYSIS OF OLD STRATHCONA FOUNDATION

Management practice: In the Annual Report of 1992, the OSF looks to the future: "We have rededicated ourselves to the historical restoration and preservation of the area. Second, we will be more active in sharing with the community the results of our work and working to build on our image and reputation. Third, we will begin expanding funding sources as we approach 1995 and our goal for self-sufficiency." These long-term plans include the creation of a designated, historic district as a means of securing restoration achievements.

Emphasis is placed on the historic buildings, parks, social events, redeveloping vacant land and on curing the 'commercial blight' of the area (OSF literature, n.d.). Design philosophy respects the historic buildings while allowing for a connection between old and new.

The trust encourages local initiative in restoration, although a problem occurred in keeping impetus going in the Area Improvement Committee, as the Historic District Feasibility Study concluded (1992). Sufficient labour to take on a storefront improvement project was lacking. However, completion of the Alberta Historic District Feasibility Study has indicated many areas for future planning.

Funding: The Foundation has succeeded in establishing broad-based funding. The funding is planned to increase community development with high-profile parades, Strolling Players Tours, and dances.
One third of its income is from management of the Princess Theatre (cinema) on the main street, again a high-profile project.
Funds also come from bingo and casinos run by the trust with volunteer labour. The City of Edmonton also provides funding. Self sufficiency is a goal for the Foundation.

The completion of restoration projects has been slowed by general economic factors but increasing the number of partnerships may offset this. Sponsors include Oldies 1260 CFRN, the Edmonton Sun, Ed Tel Cellular, the N.A. Canine Association (for a dog show), 96 K-LITE, Strathcona IGA and the Farmers' Market.

Community involvement: Community involvement is tied strongly to funding.

A booth in the Farmers' Market has been set up for information and membership brochures, as well as a caboose tourist information centre on the main road into the area. Education includes such practical initiatives as the Old House Weekend

Workshop series which entails a tour of a local Old House and discussion of restoration problems.

A Merchants' Association of 100 members provides support for the trust in its constant focus on the main street.

An oral history programme has been launched, using volunteer interviewers, and the results sent to the City Archives.

Volunteer writers contribute their research to the Plaindealer Magazine. The trust produces a newsletter, pamphlets, publications, a book on Strathcona, and it uses the media regularly.

Partnerships occur with the City of Edmonton, with local merchants, with hundreds of volunteers, and with the many people who participate in all the activities organised by the Foundation. The Foundation values its membership for both the time and financial contributions.

The techniques of the parades, dances, and walking tours are highly effective because so many people can participate and become aware of the work of the Foundation.

Focus on the main street buildings and façades, plus the tourist information caboose in the End of Steel Park guides attention to the area.

Project identification: The Foundation has chosen projects on the basis of high visibility, with a main street focus. This has led to further successes and the support of the Merchants' Association. A danger may be that once the major facelift in Whyte Avenue, the main street, is nearly complete, enthusiasm may flag. On-going projects must maintain the impetus. This will be encouraged to some extent by the information booth bringing tourists into the community.

The focus has been on public-use buildings, particularly the Princess Theatre, the library, and the farmers' market which has maintained a high profile for the Foundation. The Princess Theatre has been a major revenue-earner, setting attendance and Canadian box office records (1992 Annual Report).

ALBERTA HISTORICAL PRESERVATION & RE-BUILDING SOCIETY (Calgary, Canada)

Credo:	"Preserve our past for the future." Preservation concerns include the built environment, historical sites and objects. Education is seen as a vital tool in the preservation process (AHPRS literature, n.d.).
Legal description:	Incorporated in Alberta under the Societies Act
Date of formation:	August 1990 (incorporated February 1991)
Origin:	Private initiative stimulated by threats to two houses in Mount Royal, Calgary
Head office:	Calgary
Workforce:	Volunteer committee (Board of 8 Directors
Funding:	Membership fees Donations in kind Professional services donated Fund-raising activities
Budget:	Income: $1,200 (1993) Surplus: $700
Workforce:	Volunteer committee (Board of 8 Directors)
Major projects:	Crescent Heights inventory and ARP (area redevelopment plan), Cave and Basin swimming pool, Banff, Royal Doulton gargoyles, support for reforming the Income Tax Act for Alberta, support for reforming the Corporate Income Tax Act, support for the City of Calgary 5-year roll-back on property taxes during restoration of a property, federal lobbying of revision or relaxation of building codes, Historic Calgary Week (annually in August) - bows on historic buildings, Edworthy Park Heritage Society support for the designation of the park, Liaison with Victoria Park property owners for revitalisation of the community.

ANALYSIS OF ALBERTA HISTORICAL PRESERVATION & RE-BUILDING SOCIETY

Management practice: The Society is run by a small number of enthusiasts with skills and contacts. The president and founder is an enabler and an effective spokesperson. There is achievement despite low and fluctuating resources as the Society establishes itself.

The Society responds rapidly to information from the public regarding threats to historic buildings. This constitutes about 90% of the Society's activities.

The Society takes a reactive position on buildings under threat, but a pro-active position on change to legislation and taxes.

Objectives include obtaining charitable status before any major building restoration can be accomplished. In order to obtain this status, a balance of activities including building projects, education and social improvement is required.

Funding: Major funding is dependent on the charitable number applied for but not yet obtained. Trust work is therefore limited mainly to media work, liaison and community meetings.

Funds are obtained from membership fees, donations, and from a hot dog stand set up annually, sponsored by Safeway, to provide the Society with funds for running expenses. A table is also manned at the 4th Street Lilac Festival in May each year and various items are sold.

For particular rescue and restoration building projects there is potential private support.

Community involvement: In Victoria Park the Society has offered advice and done voluntary work. In Crescent Heights there have been frequent meetings with the community association over heritage buildings. All work is carried out with the best interests of the whole Calgary community in mind.

There is liaison with historical societies and the Inner City Coalition of downtown core communities.

The Society enjoys its greatest success in this field of liaison and communication, with regular use of the media (newspapers, radio and television). It is included in the Calgary Heritage Directory. It participates in the City of Calgary Go-Plan, a study of the future of transport in the city. In Spring every year the Society participates in the

Lilac Festival (4th Street S.W.). During Historic Calgary Week in August, the Society has a booth at City Hall and red and white bows are tied on major historic buildings to increase awareness.

Project identification: The Society is generally reactive in the building rescue it undertakes. The Society responds to requests from community associations for assistance in setting up meetings to gather support or in informing the media of potential demolition.

With a small force of volunteers it will be some time before any restoration projects can be attempted. Energies have been directed, instead, towards changing Canada's tax legislation in order to increase preservation and decrease demolition across the country. In the meantime, contacts are being made, methods are being refined, policy is being formulated, and a reputation is being created.

FORT CALGARY PRESERVATION SOCIETY (Calgary, Canada)

Credo:	"To celebrate and interpret Calgary's history." "To preserve, maintain and interpret the site of the city's fort and first settlement." (FCPS literature, n.d.)
Legal description:	Charitable organisation
Date of formation:	1977
Origin:	Started by a group of concerned citizens who wanted to reclaim the 40 acres (both sides of the Elbow River) to original condition from being an industrial site
Head office:	Calgary
Workforce:	Board of Directors (17) Staff (8) Deane House (10-15) Members, volunteers
Funding:	Municipal funding ($500,000) Provincial and federal funding (lotteries) Donations, admissions, membership Deane House tea house management Fund-raising: casino ($30,000) auction ($33,000) Corporate funding The Calgary Foundation
Budget:	Income: $1,045,000 (1994) Surplus: $96,000
Major projects:	Development Project: "History in the Making" Refurbishment of the Interpretive Centre Building of the fort - demonstration projects Development of the site - pathways, picnic areas

ANALYSIS OF FORT CALGARY PRESERVATION SOCIETY

Management practice: The Society maintains the importance of long-term planning and plans for 3-5 year periods, essential for major building projects.

A change in management policy is occurring with the streamlining of committees. The aim is to have fewer committees with more responsibility and increased staff liaison. There is also a move to redefine management to being more decentralised. Many of these changes are a reaction to decreased funding. Administrative costs for salaries were decreased by 11.7% for 1994 (1993 Annual Report).

Education for school children is a priority with management.

Fund-raising that involves the public is seen to be valuable.

Funding: The Society's goal is greater self-sufficiency as funding sources decrease. This will be achieved through the imaginative PostMark Campaign (selling plaques on which the public can put their name), the Annual Benefit Auction, casino, dinners and membership drive. These new initiatives are also aimed at raising awareness of the Society's work.

Further initiatives include the introduction of admission fees, the closing of the interpretive centre to visitors from October to March, and the reorganisation of Deane House Restaurant operations.

Fort Calgary has created partnerships with various institutions re gifts in kind: the R.C.M.P. VETS Association, the University of Calgary Environmental Design Faculty, the Centre for Livable Communities, the Boy Scouts of Canada, and the AFT Pioneers Association. Monetary donations are received from a large number of private and corporate sources.

As a tourist destination, tourism marketing is important for continuing visitation and the Society is active in making connections with the travel industry. Extensive advertising is a feature of this campaign.

Community involvement: The goal is to attract more people to the site by creating better facilities. The Society has ties with the local communities, Inglewood and East Village. It also connects with outside groups such as the Junior League. Its historical programmes are attended by a large number of Calgarians.

The Society is active in promotion as evidenced by the arrival of 88,000 visitors at the Fort in 1993. There is a comprehensive marketing plan in operation. The Society participates in the International Marketing Initiative Programme (supported by the federal government's Western Economic Diversification programme). There are curriculum-based historical programmes which bring in 9,000 children a year. Adult programmes and family events drew 10,000 people to the Fort in 1993. Co-operative programmes operate with the Inglewood Bird Sanctuary. There are Christmas concerts, a film festival (20 local film-makers), craft programmes, a natural history lecture series, the Great White Snow Show in February (2,000 people), Wildlife Week (3,000 visitors), exhibitions and displays.

Tourism marketing and co-operative advertising, media coverage and the VIP launching of events all show the emphasis the Society puts on promotion.

Project identification: As the Society was formed to preserve, maintain and interpret the site of Calgary's fort, the choice of project is simple. What has not proved so simple is the method of depiction. The Fort consists of remains underground, so archaeology is an obvious choice, with an outline created of the Fort buildings, and with artifacts displayed in the interpretive centre. The Society has now moved towards a recreation of the Fort at least in part, with building techniques being demonstrated.

The wide range of activities within the interpretive centre indicate the Society's interest in education and entertainment.

HERITAGE PARK SOCIETY/FOUNDATION (Calgary, Canada)

Credo:	"To entertain, inform and involve our guests in an atmosphere providing a heritage experience representative of pre-World War I Western Canada" (Heritage Park Annual Report 1993).
Legal description:	Non-profit charitable institution Foundation: incorporated, registered charitable organisation
Date of formation:	1963 (Park opened in 1964); Foundation 1976
Origin:	A group of Calgarians' plans for a children's amusement park in 1961 developed into a complete representation of Western Canada's heritage prior to World War I.
Head office:	Calgary
Workforce:	Society: Board of Directors (10) plus two appointees from the City of Calgary Executive Committee (staff of 70 full-time and 350 part-time and seasonal employees) Committees in areas of interest Volunteers (1500) Foundation: Board of Directors (12) (some members also on the Board of of the Society)
Funding:	Initial funding: Woods Family Foundation, the City of Calgary, corporations and individual donations; 66 acres donated by the City of Calgary, artifacts donated by the Glenbow Museum Revenue generated covers 70% of Park costs; the City of Calgary gives $1.6M annually (Parks and Recreation Department); government and Foundation grants, corporate and private donations, investments
Budget:	HP Society: Income: $4M (1993) Surplus: $126,000 Foundation: Revenue: $130,000 (1993) Equity: $1,655,000
Major projects:	Building maintenance and projects, Twelve Days of Christmas, special events, children's theatre, Old-Time Band, Street Theatre, Fall Fair, exhibitions, Young Friends Programme

ANALYSIS OF HERITAGE PARK SOCIETY/FOUNDATION

Management practice: Management actively promotes partnerships between business and the Park. Donors and volunteers are also encouraged. There is great reliance on committees of volunteers to run many aspects of the Park.

There is a commitment to using the Park both for educational and entertainment purposes.

Capital developments are ongoing, such as the acquisition and building of vehicles for Park use.

Long-term plans for future expansion to the east of the current Park have been made with the assistance of the University of Calgary Environmental Design Faculty.

Funding: Policy changes indicate that funding is increasingly being controlled by the Heritage Park Foundation. Government grants fund special projects. Foundation grants cover deficits in running costs. The City of Calgary contributes nearly $2M per annum. Heritage Park actively campaigns for corporate sponsors to cover programmes and events. Campaigning for individual donations will increase.

The special exhibition, Gasoline Alley (pumps, signs and vehicles donated by Ron Carey), has been sponsored by Shell which also advertises the exhibition at Shell gas stations.

Sponsors are encouraged to take responsibility for a particular exhibit which may connect with their company in some way.

Catered corporate and private functions are common at the Park and occur after hours, thus increasing the use of facilities.

A new initiative is the formation of the Heritage Club, whereby donors receive benefits such as free admission, an invitation to the annual Heritage Club Reception, recognition in the Annual Report, the newsletter, and the opportunity to host their own function at the Park.

Community involvement: This is manifest by the large number of volunteers (1500) who work in all capacities at the Park (Heritage Park literature, n.d.).

Passes to the Park are given to the Salvation Army and other organisations to permit all Calgarians to enjoy the Park. The 'Be Our Guest' programme at one time encouraged people to come to the Park one afternoon a week during the summer without paying an entrance fee.

Corporate sponsors play an active role in their particular field, such as railways or oil. Media sponsors cover news stories and special events. Corporate sponsors are also encouraged to cover programmes such as children's theatre, the rodeo, special exhibitions, Christmas events, the Street Theatre (enactment of historical scenes), the Fall Fair, and so on. Heritage Park is seen as a high-profile, stable, long-term institution, which enables partnerships to be formed.

Promotion is a major concern for the Park. The media cover special events extensively throughout the summer season. Tourism marketing is also very important, with the majority of visitors coming from Alberta and Western Canada (59%). Others come from the U.S.A. (18%), overseas (14%) and Eastern Canada (9%). (Heritage Park Annual Report 1993). The Park is one of the main tourist attractions in Calgary. Repeat visits from Calgarians sustain the Park at this time, so family entertainment and changing events are important throughout the summer. The Twelve Days of Christmas programme and Sunday brunches bring families to the Park in winter.

School programmes occur during the winter season, with 23,000 school groups attending the Park in 1993 (Annual Report 1993). The 'Young Friends' programme caters to children in the summer with week-long camps.

An unusual promotional effort during Stampede week in July is the Park's sponsorship of a chuckwagon. The Park also has an exhibition stand at the Stampede grounds and representation in Rope Square on Stephen Avenue Mall downtown. During special weekends at Spruce Meadows Equestrian Centre the Park has a stand and promotes its activities through volunteers and the Street Theatre players.

<u>Project identification</u>: The Society was founded to recreate a historical village in Western Canada at the turn of the century for educational and recreational purposes.

During the sixties, when the Park was begun, urban renewal projects provided many opportunities for downtown buildings to be moved and preserved. In fact, preservation of a variety of buildings from Southern Alberta has been accomplished and buildings such as houses, a newspaper office, church, schools, R.N.W.M.P. barracks and shops have been donated to the Park for preservation. The Park provided a haven for buildings which were no longer valued on site.

Now the growth of the Park has slowed. Maintenance is an important aspect of the Park's work. Preservation philosophy has also changed somewhat to value buildings in context. Re-use rather than removal is now considered. Changing economics have also slowed growth and development so there is less requirement for demolition.

These factors such as urban renewal, which enabled the creation of Heritage Park in the '60s, have changed so that the formation of further parks of this nature is unlikely.

Indeed the Park's emphasis on family entertainment, changing seasonal events, enlargement of the midway, demonstrations of crafts and agriculture, street theatre and railway events indicates less concern with building preservation and more concern with entertainment and education in a static site.

The interesting possibility of starting a new historical village from the 1920s onwards remains on the drawing board at this point. If this project goes ahead, the Park's focus will revert to saving buildings once again.

APPENDIX III: SETTING UP A TRUST

Legal description: A charitable trust (non-profit organisation) or company limited by guarantee with charitable status is the recommended legal description.

Formation: Started by a group of concerned citizens, a historic property owner, or an influential person, establishment of the trust is easier with the advice and assistance of a parent body (The Civic Trust and Amenity Societies; Groundwork Foundation and local Groundwork offices, UK).

Setting up: Every trust should be set up with professional advice to meet the particular objectives of its members. Each trust is different. Whether set up 'top-down' (with a sponsor) or 'bottom-up' (with local support), the process follows the same basic steps.

Three Basic Steps

Stage 1:

1 Contact key people who may sponsor, advise, promote or support the organisation.

2 Research other similar organisations and resources. There may be a similar organisation in place or there may be certain limitations or local restraints that should be known. Resources of all kinds (financial, local authority, information sources) are valuable.

3 Establish a consensus of what needs to be done and create a vision that will motivate those involved. Confirm any objectives with the sponsor, if there is one. (A building under threat may be the focus).

4 Develop ideas in a series of brain-storming workshops, then get professional evaluation of these ideas.

5 Establish a steering committee.

6 Set up an office.

7 Create a pamphlet or information sheets for the public and for press releases. Use the trust logo on everything so that the organisation is easily identified. (Use current business practices for ideas).

8 Start work on the form of the trust. Create a board of 8-10 well-connected or expert directors. Establish a sponsor or patron, if desired. Work towards having a small bureaucracy of professionals with a workforce of volunteers, the unemployed, secondment, labour donated by local businesses, etc. Encourage a large membership.

9 Draft legal documents for the memorandum, articles, incorporation, and negotiate the name of the trust.

10 Apply for charitable status, with the help of your lawyer.

Stage 2:

1 Recruit members if necessary. Press releases and T.V. appearances commenting on threats to historic preservation or council decisions are effective in galvanising public interest.

2 Start to cost project ideas and identify further resources.

3 Develop the initial vision into a business plan, financial and management strategy. Set time lines, budgets and labour requirements.

4 Prepare a presentation for the public and key funding agencies. Use the business plan as a prospectus, have exhibition materials and a press release.

Stage 3:

1 Hold a meeting to launch the trust. Publicise objectives, recruit more members and get local support.

2 Develop a work programme. Start on specific projects to establish credibility and create a high profile.

3 Begin to fund-raise, aiming for a wide resource base.

4 Complete recruiting, management structure, administration and incorporation.

5 Prepare a newsletter.

Future Developments:

Expand by setting up further branches in interested communities with the head office providing the techniques, advice, assistance and reputation.

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