

Organizational Capacity Building in Edmonton's Heritage Sector

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Edmonton's Heritage Sector

Edmonton's heritage sector is a diverse system of organizations, practitioners, and collaborators, each invested in the city's stories. Heritage practice is an essential service and need, with the potential to provide all Edmontonians with ownership and agency as active citizens. Community members inform modes of heritage practice, which in turn influence the way communities live, play, and work in the city. Government bodies, non-profit organizations, museums, and cultural organizations are among the stakeholders who continue to steward and support the investment of monetary and other resources to ensure that the heritage sector is supported, evolving, and thriving. The sector's shared goal is to generate knowledge and resources to inform Edmonton's current cultural state.



This word cloud was generated by heritage sector participants during a 2019 Edmonton Heritage Council organizational capacity building session.



Heritage Sector Commitment to Sustainability – Global to Local

An examination of the global and local impacts of Heritage practice is reflected in Canada’s commitment to examine how the United Nations’ [Sustainable Development Goals](#) are being implemented and measured. [Community Foundations of Canada](#) has invested in the UN’s [Agenda 2030](#) for the implementation of these goals. Edmonton is a part of this movement to enhance, preserve, and invest in building the resiliency and capacity of Sustainable Development Goal (SDG) 11.

SDG 11	<i>Make cities and human settlements inclusive, safe, resilient, and sustainable.</i>
Target 11.4	<i>Strengthen efforts to protect and safeguard the world’s cultural and natural heritage.</i>

The City of Edmonton’s commitment to implementing this global, Pan-Canadian goal in a local context is highlighted in [Connections & Exchanges: A 10-Year Plan to Transform Arts and Heritage in Edmonton](#) (C&E).

“Connections & Exchanges is Edmonton’s 10-year arts and heritage plan. It seeks to infuse culture, arts, and heritage into every aspect of Edmonton’s civic fabric, support cultural makers and interpreters, and grow Edmonton’s arts and heritage audiences. Through the ambitions that we strive towards, the aims we use to chart progress, the actions that define our approach, and the measurement framework that validates it all, this plan guides the development of Edmonton’s arts and heritage landscape through extraordinary transformation for the next decade.”

This plan is a testament to building the infrastructure of the heritage sector in Edmonton over the next ten years to develop a thriving and sustainable Heritage ecosystem.

Development of 2019 Edmonton Heritage Council Membership Capacity Building Plan

In 2019, the EHC board of directors and staff developed their strategic plan for the next three years. Based on a review of the key EHC members who receive funding to operate heritage organizations, it was clear that organizational sustainability as well as financial & succession planning were particularly essential to implement the aims of the C&E plan. Further needs identified by EHC board and staff called for intentional infrastructure for training, networking, knowledge sharing, and content development to support organizational capacity building for EHC membership in 2019 and beyond.

The following commitments are the specific Aims within the C&E plan, and link specific targets that Edmonton Heritage Council will provide to support capacity building across the sector.

- *AIM: Conditions are in place to remove barriers for all Edmontonians to participate in cultural experiences.*

Relevant Action to the Aim: Expand and target learning opportunities to build sector capacity and awareness in order to remove barriers.

- *AIM: Diverse platforms for collaboration exist within Edmonton that allow artistic and heritage communities to connect, create and collaborate.*

Relevant Action to the Aim: Connect individuals, groups, and organizations with the people, skills, networks, and resources they need to do high-quality, creative, and innovative heritage work.

- *AIM: Arts and heritage practitioners are economically resilient.*

Relevant Action to the Aim: Build funding mechanisms with an emphasis on 2 multi-year research and documentation projects, mentorships, residencies, and professional development

- *AIM: New and existing arts and heritage organizational capacity enables innovation and builds resilience in the sector.*

Relevant Action to the Aim: Increase heritage organization and practitioner capacity through training for organizational development

In response to these aims, the EHC implemented both a pilot mentorship program and a series of three workshops with a focus on organizational capacity building. These offerings were developed, organized, and hosted by the EHC in the fall of 2019. The process of selection of topics and delivery of workshop content are important to link to the aims, ambitions and measurement, evaluation, and learning framework of *Connections & Exchanges*.

To contextualize the workshop selection process, it is important to recognize that most heritage organizations that receive funding from the EHC are built on a non-profit, charitable/voluntary sector model.

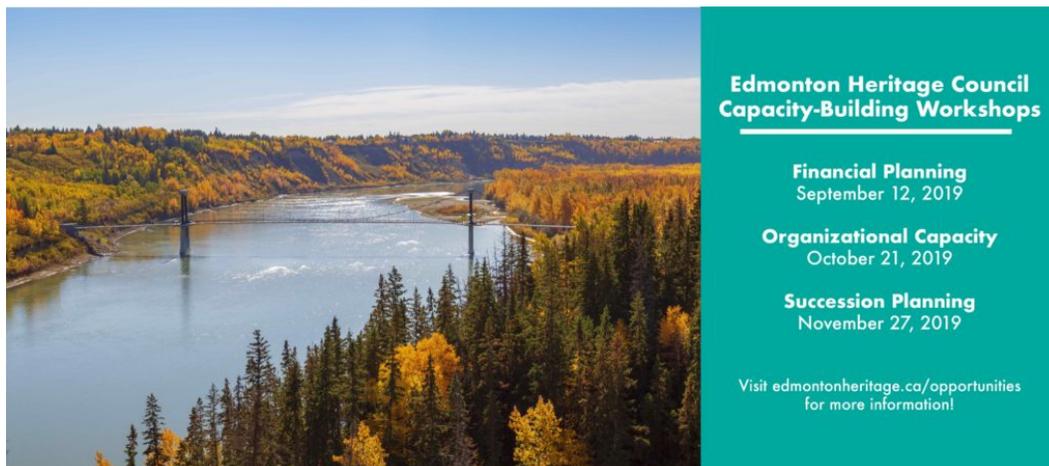
The charitable sector model is:

- Heavily reliant on funding from all levels of government or philanthropic organizations;
- Dependent on fundraising or gifts from private donors;
- Managed by a volunteer board of directors.

Many of the organizations aligning with this model do not have the capacity nor organizational infrastructure to sustain staff, so they depend on a strong volunteer base to develop and deliver heritage programming.

It is also important to understand the relationships that EHC has cultivated with those who were selected to deliver the workshops. The chosen partners have longstanding expertise in supporting organizational capacity building within heritage and non-profits.

Each workshop was crafted and delivered with the needs of the EHC member audience and HCIP grantees in mind.



Workshops Fall 2019

Overview of Financial Planning

The first workshop of the series was delivered by Sylvia Shanks, the accountant who reviews Edmonton Heritage Council Operational funding grants processes. Sylvia supports the EHC by analysing the financial standing and viability of organizations applying for Operational funding through the EHC's Heritage Community Investment Program (HCIP) each year, including an overview of their respective financial health, gaps, and strengths.

These financial reports assist the HCIP chair and grant funding committee in making informed decisions during the adjudication process. These reports help determine whether the grant put forward for Operational funding is realistic and sustainable. The same supports are provided to individuals who apply to HCIP on a case-by-case basis, if needed.

The financial planning workshop focused on outlining the financial cycle of an organization based on a fiscal year timeline. The workshop provided clear guidelines, planning tools, and considerations for the implementation of an organizational financial strategic planning process outlining the core costs related to expenses and revenue. It also included consideration of how to deliver and maintain a heritage organization's core plans, programs, and services.

Overview of Organizational Sustainability

The second workshop of the capacity building series was provided by the Hatlie Group, a consulting company that works with including museums, heritage organizations, archives, arts organizations, post-secondary programs, public sector, and community groups doing heritage or culture projects. The Hatlie Group has worked closely with the EHC and its member organizations to implement a model of sustainability that creates agile, robust organizational policies; service design models; and programs that can respond to the changing needs of the heritage sector and lead to organizational stability. The organizational sustainability workshop provided information to participants via a step-by-step guide on how to develop and implement a solid strategic plan over a long-term period. The workshop aimed to build organizational stability so that heritage services can be offered in a meaningful way in Edmonton. During this workshop, there was an opportunity to explore how operational plans can be implemented over a one-year term to develop the indicators needed to assess and evaluate the success and challenges that the organization has faced over one year of operations. This workshop provided a workbook that participants used to address their unique organizational needs. Topics covered included governance, securing funding, stakeholder engagement, partnership development, and program delivery.

The Hatlie Group Sustainability Model

*Sustainability has five facets: **culture, health and wellbeing, environment, financial, and social**. As we've worked with these facets we have further defined and refined the model and placed it in context with other elements in non-profit organizations including governance, program and service design, and a solid understanding of operational realities and the systems and structures that support success.*

The individual facets cannot be considered separately, the model has to be considered from a holistic view – if one facet is overlooked in the organization’s actions or strategy, then the entire model falls apart. This holistic approach supports resiliency and agility and provides the opportunity to discuss impacts in all areas of the organization’s work, including its relationships, activities, and communication. (p.4) – Hatlie Group Report, <https://hatliegroup.ca/%20creative%20power/>



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Overview of Succession Planning Workshop

The third workshop was created and delivered by Soni Dasmohapatra, the 2019 interim grants coordinator at Edmonton Heritage Council. Soni has two decades of experience in organizational sustainability with non-profit organizations and the philanthropic sector. She has been active in building heritage programming in Toronto and has built capacity to contribute to Edmonton’s heritage sector through her work with EHC and her consultancy practice. Soni opened the workshop by outlining and encouraging discussion of the topics listed in the description above.

The succession planning workshop focused on practices and foresight strategies that identify what kinds of human resources are needed to deliver programming and keep the organization operational. Heritage organizations need to invest in attracting new talent and supporting existing professionals to facilitate a thriving heritage ecosystem. The workshop encouraged the participants to think critically about frameworks such as creating healthy work cultures, staff retention, organizational growth, volunteer engagement, intergenerational knowledge transfer, and investment of talent and professional development in the sector. This workshop encouraged participants to consider organizational policies and human resource procedures focused on implementing frameworks of equity, diversity, and inclusion in practice.

For this workshop, Soni decided to include a youth engagement perspective. She partnered with Volunteer Alberta, inviting them to share insights from their [Youth @ the Table](#) program. Topics included best practices for volunteer engagement, entry-level career options, youth retention, and how to involve youth in processes of board governance. For the second half of the workshop, Youth @ the Table staff facilitated an open technology interactive activity that allowed for discussion and dialogue around how to encourage young people to participate in developing organizational sustainability through internships, board involvement, and volunteer placements.

Overview of Workshop Participants

Many of the participants who attended the workshop were members of EHC and had applied for the Heritage Community Investment Program grants in the past or were planning to in the future. There were also some new participants who were involved in the heritage sector and were interested in the content provided by this series. The first workshop was well attended with 20 participants. The second workshop had 17 participants, with 25 at the third. Present at this final session were staff from a heritage organization in Smokey Lake, as well as representation from St. Albert and Strathcona County.

2020 Edmonton Heritage Council Investment

EHC's 2020 commitments (as identified by EHC's executive director and board of directors) reiterate the continued investment to build heritage sector capacity:

- *Alive with Arts and Heritage*

Reducing barriers to accessing HCIP is our main priority. The EHC wants to hear from people who are doing exciting and innovative heritage work across the city. The EHC will be actively seeking out projects that involve neighbourhoods and

communities often left out of heritage work. EHC will continue to support work that engages new communities in heritage and tells stories from voices less heard.

- *A Hub for Extraordinary Reputation and Creation*

The EHC will create more opportunities for heritage professionals to learn, explore, and share their work in Edmonton and worldwide. The EHC will focus our support on individuals and organizations who make continuing commitments and tangible contributions to heritage work in our city.

- *A Thriving and Well-Funded Arts and Heritage Ecosystem*

The EHC will explore new ways to support ongoing heritage programs and multi-year projects. The EHC will work to support projects that include mentorship and professional development and encourage organizational capacity building within the heritage sector.

Future Considerations

Edmontonians value the cultural fabric of their city, as well as its constantly evolving identity. As such, the sector will need to adapt to these changes with agility and thoughtfulness when considering the factors of urban sprawl, intergenerational diversity, Indigenous voices, and the engagement of ethnocultural and racialized peoples. The EHC and the sector must develop key messages that emphasize the importance of building relationships that provide access to diverse forms of storytelling grounded in history to inform current practice.

Strategic planning and resources need to be dedicated for the sector to meet the targets outlined in the C&E report. The following recommendations can also inform the key performance indicators being developed for the MEL framework over the next three years.

Recommendations

- Continuing to build on the Indigenous partnership & program development, EHC portfolio.
- Implementing the Truth and Reconciliation Commission of Canada (TRC) Actions in the areas of Heritage and Culture.
- Dedicated internal organizational planning to scale HCIP-funded projects in partnership with Edmonton City as a Museum Project (ECAMP).
- Applying for joint partnership and funding to support access to diverse program/project resources, educational opportunities, and events that share the

heritage of underserved communities in Edmonton such as Black Heritage and Asian Heritage in Edmonton.

- Building on the 2019 mentorship pilot program to offer at a larger scale in the next iteration and delivery.
- Providing opportunities for continuing education, professional development, skills and training workshops for heritage organizations and practitioners. The purpose of this offering is to build the capacity of organizations and professionals to share diverse heritage work with a focus on supporting equity and building cultural narratives that are inclusive of Edmonton's cultural, political, and social realities.

Conclusion

Intentionality must be front and centre when suggesting which capacity building work needs to be prioritized. Appropriate resources must then be dedicated to these programs and opportunities. The C&E plan identifies the possibility of offering fellowships and bursaries to provide unique opportunities for heritage practitioners and organizations to invest in research and development of knowledge transfer for fostering the growth and sustainability of heritage content to be shared with the City of Edmonton. There is an ongoing need to revisit and invest in the city's heritage ecosystem. The opportunity is now for Edmonton Heritage Council to champion and influence the sustainability and relevance of the heritage sector in Edmonton.

About the Author

Soni Dasmohapatra is a consultant who works with individuals, groups, public service institutions, and community agencies to facilitate the development of tools that focus on building inclusive platforms that incorporate strategy, design, wellness, and art for transformative change. Visit www.sonidasmohapatra.com.