



**EDMONTON
HERITAGE SECTOR
SURVEY 2013**

EXECUTIVE SUMMARY

HERITAGE

At its best, the study of heritage is not just another discipline in the range of subject areas included in the curriculum. It informs all subjects because it is really the study of human generations – their work, their understandings and preoccupations. It dwells on the matter of continuity between generations. Equally, it is the knowledge of the watersheds in human experience that provide the framework for how communities and individuals understand themselves.

Adriana Davies
Edmonton heritage professional
from the ART OF LIVING

A PLAN FOR SECURING THE FUTURE OF ARTS AND
HERITAGE IN THE CITY OF EDMONTON, 2008 – 2018

EXECUTIVE SUMMARY

The Edmonton Heritage Council (EHC) was created to provide leadership and support to the City's heritage community. Heritage institutions and organizations preserve, study, collect, research and interpret aspects of the tangible and intangible heritage for the education and enjoyment of Edmontonians and visitors to the City. In order to strengthen the sector, the Edmonton Heritage Council initiated the Edmonton Heritage Sector Survey 2013 whereby a minimum of 50 organizations/groups that do heritage work in Edmonton would be contacted to provide the following information:

- Organizational: Mission, vision, mandate, governance, location, staffing, hours of operation, visitor statistics (if any), general budget;
- Programmatic: The heritage work and activities that they do, in detail, including program names, their scope, frequency of offering, years its been offered and outcomes;
- Partnership and Outreach. What other organizations foster, support or collaborate with the interviewee and what group and communities do they reach out to.

In addition to surveying heritage groups, 15 independent heritage professionals were also surveyed to provide information about how they support the sector through their heritage work.

With data collated from the survey, the study would then provide the Edmonton Heritage Council with relevant and up to date information regarding the sector to move forward with a number of planning initiatives.

The study builds on a number of reports on Edmonton's heritage sector commissioned by the Edmonton Arts Council:

- The Art of Living: A Plan for Securing the Future of Arts and Heritage in the City of Edmonton, 2008 – 2018, Edmonton Arts Council, 2008
- Creative Edmonton: Envisioning a Culturally Vital Community, City of Edmonton Cultural Inventory Final Report, Heritage Community Foundation, Edmonton Arts Council, December 2007
- Edmonton's Heritage Community, An Environmental Scan for the Edmonton Arts Council, J. Ross and Associates, May 2007

This study also builds on the following reports commissioned by the Edmonton Heritage Council:

- City Museum Development Strategy Report (Vol. 1), September 2012
- City Museum Development Strategy Report (Vol. 2 Facility options), September 2012
- Comprehensive Museums Strategy: Strengthening Edmonton's Museum Sector, September 2012
- Developing & Preserving Edmonton's Historical Collections: Artifact Centre & Archives Strategy, Lundholm Associates Architects & Catherine C. Cole & Associates, February 2011
- Edmonton City Collection Repository: Functional Program, Lundholm Associates Architects, June 2011
- Fort Edmonton Park Collection Repository: Functional Program, Lundholm Associates Architects, June 2011
- Preliminary Assessment for a "Civic" or "City" Museum in Edmonton, May 2007

ACKNOWLEDGEMENTS

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Connect Cultural Consulting, which designed and implemented the study, wishes to acknowledge the advisory support of David Ridley, Executive Director, and Ericka Chemko, Program Coordinator, Edmonton Heritage Council.

We also wish to thank representatives from the heritage community, Juliette Champagne, Lan Chan-Marple, Adriana Davies, and Tim Marriot along with the Archives Society of Alberta for their input and assistance in the preparation of this study.

Thanks are also due to the numerous heritage and heritage professionals in Edmonton, who completed the surveys, providing us with a range of data as well as opinions as to the present state and future of Edmonton's heritage sector.

RESEARCH METHODOLOGY

The following methodology was employed in the course of conducting the Edmonton Heritage Sector Survey 2013.

Edmonton Heritage Sector Survey | 2013: Survey Design and Tools

- The contact information for heritage groups and independent heritage professional contact information was researched by the consulting firm and confirmed with the EHC.
- Separate surveys for Heritage Groups and Independent Heritage Practitioners were designed by the consulting firm; these were reviewed and approved by the EHC;
- The Edmonton Heritage Council (EHC) Heritage Sector Survey 2013 was fielded from November 26 to December 31 using an online tool, FluidSurveys. FluidSurveys is a Canadian-based survey company with offices and data servers based in Edmonton.

Edmonton Heritage Sector Survey | 2013: Heritage Groups

- The Heritage Groups survey included museums, archives, historic sites, historical societies and groups, municipal heritage agencies and Friends societies and heritage foundations. Invitations to participate in the survey were sent via email to the primary contact for each heritage group.
- A total of 53 surveys were sent with 27 responses, a 50% response rate.

Edmonton Heritage Sector Survey | 2013: Independent Heritage Practitioners

- Independent Heritage Practitioners survey was sent to those are self-employed or undertakes heritage work on a dedicated volunteer/self-interest basis accomplishing some or all of the following functions: administration, research, conservation, exhibition, public programming, education programing, interpretation or communication/marketing. This survey group was defined using the same definition as used for the 2007 cultural inventory.
- The consulting firm researched additional heritage practitioners, such as trades people and heritage storytellers operating in Edmonton;
- A total of 15 surveys were sent, with 10 responses, a 71% percent response rate.

Edmonton Heritage Sector Survey | 2013: Cultural Groups

- Cultural groups and known heritage practitioners working with cultural groups were emailed a simplified survey template, which included the name of individuals and/or associated cultural groups undertaking the preservation of tangible or intangible heritage along with contact information, and an indication of whether the activity would be categorized as Tangible or Intangible cultural heritage preservation.
- Additional phone or in-person interviews and sector research as required.
- A total of 10 surveys were sent with 5 responses, a 50% response rate. The consulting team conducted additional research.

Contextual Research

To help put the research findings into a broader and meaningful context, additional research was conducted into the following areas.

- The broad socio-economic trends and demographic changes which will be influencing Edmonton's heritage sector over the next five years;
- The strategic priorities of local, provincial and national heritage and tourism/economic development agencies and departments, including anticipated program, service and funding support for the sector;
- Existing and emerging markets for the programs and services offered by Edmonton's heritage sector, additional research into visitation statistics, market trends and market strategies was undertaken.

SUMMARY FINDINGS and RECOMMENDATIONS

The study provides a range of information as well as recommendations with respect to the vitality of Edmonton's heritage sector.

Many of Edmonton's heritage organizations were developed in their current inception between the 1960s and the 1980s, in concert with celebrations for 100th anniversary of Confederation and the 75th anniversary of the Province of Alberta joining Confederation, a period during which an interest in heritage was high and significant funding was available to support heritage preservation. The Provincial Archives of Alberta was the only major new facility developed in Edmonton as part of the Province of Alberta's 100th celebrations. At the end of 2013, three new heritage facilities were in various phases of construction, with openings slated between 2014 and 2017.

The City of Edmonton was designated as a Cultural Capital of Canada in 2007; *The Art of Living: A Plan for Securing the Future of Arts and Heritage in the City of Edmonton, 2008 - 2018*, a watershed cultural plan for Edmonton was funded through Canadian Heritage as a result of this designation. From the recommendations in the *Art of Living*, the Edmonton Heritage Council was established in late 2009.

The Edmonton Heritage Sector Survey 2013 report outlines how the sector is funded, the cultural resources its responsible for in its role of public trust, the make-up of the sector's human resources, how the public is accessing heritage in Edmonton, and how heritage is currently being promoted in Edmonton and to who as of year-end, 2013.

Overall, the study indicates that Edmonton's heritage sector:

- Ranges in scope from small volunteer run non-profit groups to multi-disciplinary, multi-departmental institutions with a large staff.
- Is in a period of relative financial stability and enjoys very good public value and support;
- Remains tied to the overall economy of Canada and Alberta, particularly Alberta's energy economy;
- Is largely dependent on government support and less on earned revenues and private sector support;

- Among smaller groups and institutions, is demonstrating low levels of volunteer support and declining membership;
- Is not universally accessible to the public on weekends and evenings;
- Is not consistently promoted to create public awareness and knowledge of the sector;
- Does not uniformly or universally utilize social and digital media as tools to engage audiences.

Section 1 | Edmonton's Heritage Sector

- A full inventory of Edmonton's heritage groups is found in Appendix A and is summarized by name in Section 1 of the study. Indicated in the summary are those groups which participated in the survey and those for which a summary listing with contact information and a summary of heritage activities researched by the consulting team (indicated by a ● or ○ respectively).
- A full inventory of independent heritage practitioners is found in Appendix B and is summarized by name in Section 1 of the study. Indicated in the summary are those individuals which participated in the survey and those for which a summary listing with contact information and a summary of heritage activities researched by the consulting team (indicated by a ● or ○ respectively).
- An inventory, though not exhaustive, of cultural groups undertaking tangible or intangible heritage work is found in Appendix C. This inventory lists only those groups that responded to the emails and/or phone calls by the consulting firm.
- The sector enjoyed a period of significant growth from the mid-1960s to the mid 1980s, with relatively stability and modest growth since. The most significant capital development recently was the opening of the Provincial Archives of Alberta in 2005; there are three new facilities currently under construction.

Recommendations

- That a survey of Edmonton's heritage sector is regularly undertaken with full sector support to coincide with other sector surveys at the provincial/federal level to provide comparative data.
- That strategies to effectively survey cultural groups be developed to enhance future sector survey.

Section 2 | Funding Edmonton's Heritage Sector

- Edmonton's heritage sector generated operating revenues of \$26,678,469 in 2012 (reporting organizations, groups, institutions, and agencies);
- The composition of funding for Edmonton's heritage sector is 75% (\$19,884,837) government support, 1% (\$378,430) private sector support, and 24% (\$6,415,201) earned revenues. Additional breakdown by subsector is provided in the report;
- 43% had budgets under \$100,000; 19% had budgets between \$101,000 and \$250,000; 11% had budgets between \$250,001 and \$500,000, 8% had budgets between \$500,001 and \$1,000,000; 19% had budgets over \$1,000,000;
- Budget pressures include facility costs, staffing costs, uncertain government funding
- Government funding programs have enjoyed relative stability. The elimination of the STEP program by the Province in their 2013/2014 budget widely affected Edmonton's heritage sector. Changes to the federal MAP program in the past two years have impacted some of Edmonton's larger heritage institutions; elimination of federal archives program in 2012 impacted funding for Archives;
- 16 organizations/institutions, or 61% of the sector, had memberships.
- 15 groups and institutions, or 57% of the sector, indicated that they have a current strategic plan. 4 indicated that they are in the process of reviewing their strategic directions.

Recommendations

- 2.1 That Edmonton's heritage stakeholders examine ways to broaden their base of operational funding to include strategies for developing greater community/philanthropic support and creating diverse earned revenue streams to help buffer any cuts to government program funding;
- 2.2 That Edmonton's heritage stakeholders need to examine ways to reconnect with and renew their membership base to provide a platform from which to build community support for their group or institution's mandates and operations.
- 2.3 That Edmonton's heritage stakeholders look to developing long-range strategic plans that address fiscal and operational sustainability.

Section 3 | Edmonton's Heritage Resources

- *Heritage Resources.* To provide a holistic view of the heritage sector, a review of Edmonton's designated and registered historic resources was undertaken by the consulting team and examined which heritage institutions are housed in heritage facilities. A full inventory of Edmonton's designated heritage resources is found in Appendix D.
- *Archival Collections.* A full inventory of Edmonton's archival collections is found in Appendix D of the study. A significant number of Edmonton's archival holdings are faith-based; as a result, access to some records or collections are restricted by the religious order or group. A working group of Alberta faith-based archives and archivists in Edmonton meets occasionally to discuss the unique issues related to the maintenance of faith-based archive records.
- *Material (Artifact) Collections.* A full inventory of public collections is found in Appendix D.
- *Cultural Heritage Preservation.* A list of those organizations and individuals that are involved in preserving Edmonton's tangible and intangible cultural heritage and had responded to the survey is located in Appendix C. Included, where possible, is the scope of the organization's current heritage work. This list is not exhaustive and represents only those groups that have responded to the survey. Three organizations identified that they are working to document and celebrate Edmonton's cultural heritage as a strategic priority.
- 90% of collecting groups/institutions have collection policies.
- 7 institutions in Edmonton held both archival and artifact collections.
- 6 institutions in Edmonton provided online access to collections. Creating or enhancing the availability for the public to access their collections online was identified by three organizations as a strategic priority.

Recommendations

- 3.1 That heritage stakeholders develop and promote opportunities for the public to access Edmonton's heritage resources online (see Recommendation 5.1).
- 3.2 That heritage stakeholders develop avenues to acknowledge and promote those initiatives and efforts that support the conservation of Edmonton's historic resources.

3.3 That Heritage stakeholders foster greater involvement of Edmonton's cultural heritage organizations in dialogue related to the preservation of Edmonton's heritage, including opportunities for cultural representation on Boards, ad-hoc and standing committees, participation in workshop presentations, and the like.

Section 4 | The Public Face of Heritage

- **Volunteers.** 77% (21/27) responding heritage groups and institutions have volunteers. 23% (5/21) groups have formal volunteer coordinators and 38% (7/21) have volunteer policies;
- **Board of Directors.** Of the 27 heritage groups and organizations that responded to the survey, 17 are governed by a board of directors. The range of the number of people on a board is between 4 people to 20 people with a median board size of 11. 82% (14/17) of Boards indicated that they had current board governance policies. 228 people served on boards in 2013.
- **Paid Staff.** 62% (17/27) of heritage groups and institutions have staff. The heritage sector employs 210 full-time; 85 part-time; 125 seasonally, and 56 on contract.
- **Independent Heritage Professionals.** An inventory of independent heritage professionals is located in Appendix B. 80% said that Edmonton was a good place to be an independent heritage professional, with most practicing on their own or bringing on additional expertise on an ad-hoc project basis. 40% work full-time, 40% work part-time, 10% work occasional and 10% work without deriving an income. 80% indicated they are able to meet projected/desired income levels.
- **Independent Heritage Practitioners.** A list of heritage practitioners, such as craftsmen and storytellers is included in Appendix B;
- **Cultural Heritage Preservation.** A list of those organizations and individuals that are involved in preserving Edmonton's tangible and intangible cultural heritage and had responded to the survey is located in Appendix C. Included, where possible, is the scope of the organization's current heritage work. This list is not exhaustive and represents only those groups that have responded to the survey.

Recommendations

4.1 That a central Edmonton heritage job board be created to promote volunteer employment and contract opportunities for Edmonton heritage workers. The opportunity to partner/collaborate with the EAC in the development of a central cultural job board should be explored.

Section 5 | Public Access to Heritage

- Of the groups that provided public access to heritage through collections, exhibitions, programs and/or other services, 95% (19/20) are accessible weekdays, 73% (14/19) are accessible on weekends, 5% (1/20) accessible only by appointment. However it should be noted that access to heritage facilities and programming is quite variable; some institutions are only open weekends in the summer, some are only open one weekend day or only a portion of a weekend day. There are few institutions that are open year-around on weekends, such as the Alberta Aviation Museum, the Alberta Legislature Visitor Centre, the Royal Alberta Museum.
- 3 groups provide access to collections online; 4 provide virtual exhibits or tours online, 2 have provided build heritage resources online, and only 1 has any online retail presence. A total of 11 of 27 responding groups have resources available online.

Recommendations

5.1 That heritage stakeholders further develop and promote opportunities for the public to access Edmonton's heritage resources online (see Recommendation 3.1)

5.2 That heritage stakeholders increase the level to which the public can access community heritage resources onsite by expanding their hours of operation.

Section 6 | Promotion of Edmonton's Heritage

- The market for education programming was generally categorized as K-12, with an emphasis on the core social studies curriculum of Grades 4 and 6.
- The core markets for other public programming and events was generally categorized as family, seniors and children in the survey responses.
- The core markets for general admission was generally categorized as families.
- All heritage groups and institutions surveyed have a website, however the variable quality of these websites should be noted;
- 11 of the 53 groups surveyed utilize social media to engage audiences; only 27% (3/11) of those that use social media as an engagement tool have a formal social media policy.

Recommendations

- 6.1 That Heritage stakeholders align marketing strategies with those of external marketing organizations such as Travel Alberta and Edmonton Tourism and with new marketing initiatives coming forward through the Edmonton Heritage Network;
- 6.2 That additional market research be undertaken by the heritage sector to better identify local and travel market demographics, consumer habits, media use, and anticipated needs; this includes the development of universal visitor tracking mechanisms;
- 6.3 That Heritage stakeholders undertake social media training and develop social media policies that support and enhance audience engagement strategies.

GLOBAL TRENDS WITH LOCAL IMPACTS

A number of emerging global socio-economic and sectorial trends will have a significant impacts on Edmonton's heritage sector over the next five years and have been factored into the recommendations brought forward in this report. They include:

- Changing Demographics and Population Growth
- Public Involvement and Community Engagement
- Advances in Digital Technology and 24/7 Access to Information
- Globalization of Culture
- Living Local
- Focus on Permanent Collections and In-House exhibits

APPENDIX

Heritage Groups and Independent Heritage Professionals Surveyed

1.1 | PROVINCIAL, MUNICIPAL and COMMUNITY MUSEUMS

P	NAME	APPENDIX
●	Alberta Aviation Museum	A
●	Alberta Pioneer Railway	A
○	College and Association of Registered Nurses of Alberta Museum and Archives	A
○	Edmonton Power Historical Foundation	A
●	Edmonton Public Schools Archives and Museum	A
●	Edmonton Radial Railway Society	A
●	Fort Edmonton Park	A
●	John Walter Museum	A
●	Loyal Edmonton Regiment Museum	A
●	Royal Alberta Museum	A
●	Telephone Historic Centre	A
○	Ukrainian Canadian Archives and Museum of Alberta	A
○	Ukrainian Catholic Women's League of Canada (UCWLC) Museum of Edmonton Eparchy	A
●	University of Alberta Museums	A

1.2 | PROVINCIAL, MUNICIPAL and COMMUNITY ARCHIVES

P	NAME	APPENDIX
○	The Catholic Archdiocese of Edmonton Archives	A
●	City of Edmonton Archives	A
○	Edmonton Catholic School Archives	A
○	Institut du patrimoine de la francophonie de l'ouest canadien	A
●	Jewish Archives and Historical Society of Edmonton and Northern Alberta	A
○	Lutheran Historical Institute, Concordia University	A
○	Missionary Oblates (OMI Lacombe Canada), Grandin	A
●	Provincial Archives of Alberta	A
○	United Church of Canada, Alberta and Northwest Conference Archives	A
○	University of Alberta Archives	A

● denotes participation in the Edmonton Heritage Sector Survey 2013

○ denotes contact and summary information regarding scope of heritage activity available only

1.3 | PROVINCIAL HISTORIC SITES

P	NAME	APPENDIX
●	Alberta Legislature Visitor Centre	A
●	Government House	A
○	Rutherford House Provincial Historic Site	A

The Provincial Historic Sites are those sites that are operated by the province of Alberta and are open to the public with programs and/or exhibits. A full list of federal, provincial and municipal designated historic resources is found in Appendix D with links to the full registries of historic resources registered by each jurisdiction.

1.4 | HERITAGE PROGRAMMING

P	NAME	APPENDIX
●	Edmonton Heritage Festival	A
○	Edmonton Regional Heritage Fair	A
○	Edmonton Transit Heritage Program	A
○	Edmonton Historic Festival, Doors Open	A

1.5 | HERITAGE GROUPS and ORGANIZATIONS

P	NAME	APPENDIX
○	Alberta Geneological Society, Edmonton Chapter	A
●	Alberta Labour History Institute	A
○	Archaeological Society of Alberta, Strathcona Chapter	A
●	Canadian Militaria Preservation Society	A
●	Edmonton and District Historical Society	A
●	Highlands Historical Society	A
●	La Société généalogique du Nord-Ouest	A
○	Northern Alberta Pioneers and Descendants Association	A
●	Old Strathcona Foundation	A
●	Olde Towne Beverly Historical Society	A
○	Preserve Garneau	A
○	Société Historique Francophone Alberta	A

● denotes participation in the Edmonton Heritage Sector Survey 2013

○ denotes contact information only available

1.6 | MUNICIPAL HERITAGE AGENCIES

P	NAME	APPENDIX
●	City of Edmonton Artifact Centre	A
○	City of Edmonton Heritage Planning Department	A
●	Edmonton Historical Board	A
●	Edmonton Heritage Council	A

1.7 | FRIENDS AND HERITAGE FOUNDATIONS

P	NAME	APPENDIX
○	Fort Edmonton Foundation	A
○	Friends of Royal Alberta Museum Society	A
●	Friends of the Provincial Archives of Alberta Society	A
○	Friends of Rutherford House Society	A
○	Friends of the University of Alberta Museums	A
●	Government House Foundation	A

1.8 | INDEPENDENT HERITAGE PROFESSIONALS

P	NAME	APPENDIX
○	Lewis Cardinal	B
●	Dr. Juliette Champagne	B
●	Catherine C. Cole and Associates	B
●	Connect Cultural Consulting, Ron Ulrich	B
●	Dr Adriana Davies	B
●	Marianne Fedori	B
○	Heritage Collaborative, Bob	B
○	Lawrence Herzog	B
●	Shirley Lowe	B
●	Danielle Metcalfe-Chenail	B
○	David Murra	B
●	Jane Ross and Associates	B
●	Virginia Stephen	B
○	Ken Tingley	B
●	Johanne Yakula, From Times Past	B

● denotes participation in the Edmonton Heritage Sector Survey 2013

○ denotes contact information only available


1.9 | HERITAGE PRACTITIONERS

P	NAME	APPENDIX
○	Heritage Trades and Replicas	C

1.10 | CULTURAL HERITAGE PRESERVATION

P	NAME	APPENDIX
○	Cultural Heritage Preservation Groups and Individuals	C

- denotes participation in the Edmonton Heritage Sector Survey 2013
- denotes contact information only available



People must know the past to
understand the present and face
the future. ...

Nellie McClung



Edmonton Heritage Sector Survey 2013

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