

Town of Cochrane

**Heritage Conservation
Incentives Program**

and

**Heritage Awareness
Program**



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North-West Mounted Police Barracks and All Saints Anglican Church, Cochrane
(Glenbow Archives NA1130-18)

1.0 INTRODUCTION

A comprehensive heritage management plan consists of an effective blending of enabling legislation, processes to carry out the intent of the legislation, and practices to ensure that responsible conservation is implemented. Once the plan is implemented, it becomes a heritage management program.

Heritage can be defined as anything of a physical, cultural or social nature that is unique to, and valued by, a community, and can be passed from generation to generation. Heritage is important for a number of reasons. Each community's heritage is distinctive and therefore can help instill a sense of community identity and resident pride. It promotes a sense of continuity for residents, an understanding of where we have been and how we got here today. As such, key resources should be preserved for future generations to enjoy and benefit from. Heritage conservation is also important economically; it can increase property value and provide opportunities for business, property owners and tourism.

However, the value of conserving a community's heritage is not always immediately recognized, especially if there are other perceived financial benefits to eliminating heritage assets through redevelopment or replacement. In cases where there are other external pressures threatening heritage assets, it has been recognized that more effective conservation will be achieved through incentives rather than by stringent regulation. Heritage property owners will benefit more from the "carrots" being offered than by "sticks." The result of an effective incentives program is satisfaction and benefits on all sides, plus renewed investment in heritage properties.

A Heritage Management Plan was prepared for the Town of Cochrane in 2001-2002. Among the Actions identified for immediate implementation were:

Recommendation #8: The Town should create an effective and manageable set of incentives to empower the heritage management program.

- *Develop a set of incentives that may be used to encourage owners to have their properties designated*
- *Develop a policy identifying how these incentives will be calculated*
- *Develop a policy identifying how these incentives may be applied as compensation in the event of involuntary designation*

Recommendation #9: The Town should work with historical societies and the proposed Heritage Advisory Committee to promote heritage awareness through programming.

- *Identify heritage programming that is currently in place*
- *Do not duplicate efforts*
- *Identify programming opportunities*
- *Identify how these programs and events will be managed and who will take responsibility for them*
- *Seek resources both inside and outside of the community for financial and advisory assistance*

1.1 ENABLING LEGISLATION

This section refers to the power enshrined in government legislation that allows various actions or processes to be carried out by governmental agencies in order to assess or protect historical

properties. In the Province of Alberta, these powers rest in two Acts: the *Historical Resources Act* and the *Municipal Government Act*. While the *Municipal Government Act* enables the regulatory powers contained within the Land Use Bylaw, it is the *Historical Resources Act* that is the major legislative tool with the power to control development or actions affecting historic buildings, structures and areas.

The *Historical Resources Act* contains several Parts devoted to heritage conservation at the provincial level. Part 2 (Historic Resource Management) and Part 4 (General) contain the Sections that are most applicable at the municipal level. Both of these Acts provide the legislative foundation to implement incentive and public awareness programs.

1.2 INCENTIVES AND PUBLIC AWARENESS

Incentives refer to programs or measures administered by the municipality or other community-based agencies to encourage the protection and retention of historic resources. Unlike regulatory measures, these tools usually offer something to the owner or developer in return for undertaking rehabilitation work or legal protection. Often they work in hand with the policies referred to above to offer tangible advantages to owners. Examples of incentives are grant programs, tax incentives, technical assistance, or discretionary powers under the Land Use Bylaw which allow the Development Authority to waive certain requirements normally required under the development permit or, in some situations, to offer compensation in the form of density transfers or density bonuses.

Public awareness programs are a critical part of any heritage management program and may be administered by the municipality or community groups. These are the activities and events that engage the community with the purpose of raising the public profile of heritage buildings and sites within the community. Examples of public awareness programs are interpretive plaque programs, heritage walking tours, annual award programs for rehabilitation work, community “how-to” workshops, lecture programs on heritage topics, heritage festivals, school programs, or festivities marking important historic events significant to the community, the province or the nation. Although these activities are time-consuming and require commitment and energy from the community, they are often the most recognizable component of a heritage management program.



Crew of Cochrane Brickyard, c. 1900s
(Glenbow Archives NA966-2)

2.0 HERITAGE CONSERVATION INCENTIVES PROGRAMS

Should a community decide to adopt an incentives program to encourage the retention, rehabilitation and protection of its heritage resources, program development generally involves a number of steps:

- A community recognizes the benefits of support to owners of heritage properties
- The needs of heritage property owners are identified
- Support mechanisms are explored and the most appropriate methods are selected
- The incentive program is designed to include eligibility criteria, program management, staff coordination and budgeting, and a variety of components that provide both financial and non-financial support
- The terms and conditions of receiving incentives are determined (level of protection) based on the owner applying accepted conservation standards or principles and guidelines
- The incentive program is implemented, monitored, and modified periodically to respect the changing needs of property owners and the community

The Town of Cochrane has not yet adopted a set of conservation principles, conservation standards, and development guidelines for the assessment of permit applications. The intent of conservation principles and guidelines was explained in the Town of Cochrane *Heritage Management Plan* prepared for the municipality in 2002. The Federal government has now prepared an official set of heritage conservation guidelines, *Standards and Guidelines for the Conservation of Historic Places in Canada*, which the Town could adopt as the basis for its assessment of heritage applications.

Property owners are the group most likely to benefit directly from heritage conservation incentives. They may be individuals, businesses, corporations or organizations. Property owners generally fall into the following categories of ownership:

- Commercial (revenue-generating)
- Residential
- Religious, Industrial, Governmental, Institutional

All properties on the Town of Cochrane Heritage Register should be considered eligible for financial incentives.

The following are the incentives that the Town of Cochrane has the authority through existing enabling provincial legislation to provide to property owners:

- a range of types of incentives (financial, developmental, administrative)
- negotiated incentives (Agreements, Special Land Uses and Compensation Agreements)
- other sources (Heritage Advisory Committee or other grant agencies)

The application of an incentive should be subject to the following conditions:

- The proposed work on the site would be compatible with and sympathetic to the character and context of the heritage site according to conservation principles.
- The work would be assessed based on recognized standards and guidelines
- The heritage character-defining elements of the site are maintained

- For larger incentives, proof of financial necessity may be required
- The heritage site is legally protected
- Financial incentives would be repaid if the site is destroyed

The sources of these incentives are generally grouped within programs and processes provided through the three levels of government. These are discussed below under municipal, provincial, and federal categories.

Legal protection must be a pre-requisite for any assistance.

2.1 MUNICIPAL INCENTIVES

Heritage conservation incentives are intended to enable a local government to encourage property owners to restore or to rehabilitate their heritage properties, and enable communities to provide assistance to owners of heritage properties.

Local government may provide financial and non-financial support to owners of heritage properties. Direct financial support may be given in the form of monetary grants to property owners, or indirectly through tax incentives. Non-financial support may be provided in the form of regulatory relaxations, additional density, the transfer of density and support services such as: program coordination, assistance to a nonprofit society, technical advice, public works projects (e.g., public realm street and sidewalk improvements), commemoration, and/or priority routing of heritage applications.

The Town of Cochrane must identify and expand the range of conservation incentives that it can offer. These can be offered in several different ways, including development-related, financial, and administrative incentives, as well as building code equivalencies.

It should be noted that incentives to encourage rehabilitation work are usually directed towards work primarily on a building's exterior. However, it is ultimately up to the municipality to decide how these incentives may be directed.

2.1.1 Financial

The experience of many other jurisdictions has proven that, if applied properly, financial incentives for the rehabilitation and restoration of heritage buildings are a sound investment for all parties. They are also regarded as generally the most attractive incentive for property owners since they are perceived as being more direct and tangible.

Direct financial assistance may be offered by a community that (a) has budgeted for the financial resources and (b) believes that direct financial assistance is the most productive incentive it could use to facilitate the conservation of specific properties. It has proven to be one of the most effective ways to encourage private owners to retain and maintain heritage buildings and sites.

Legal protection must be a pre-requisite for any financial assistance.

The following types of financial incentives are recommended for consideration by the municipality:

2.1.1.1 *Conservation Grants*

Modest financial grants are sometimes extremely effective in promoting conservation, especially in the residential context. These are often only seed money or a show of support rather than reflecting a large share of restoration costs. Grants sometimes “top up” a project so that the specific heritage character-defining elements can be restored. Sometimes relatively small projects can have a dramatic impact on the appearance of a heritage building exterior (e.g., opening of an enclosed verandah, heritage paint colours, re-installation of wood windows and doors, roof replacement).

The Town of Cochrane has received a donation of \$40,000 from the Cochrane Centennial Committee for the preservation of historic buildings. These funds have yet to be allocated, and could be used either for direct grants to heritage sites or to establish a self-perpetuating endowment fund. This type of fund could grow over time through community fund-raising and ultimately the earned interest could be used for ongoing granting purposes.

The Town could consider establishing a modest annual budget for conservation grants, offered through the Town and its Heritage Advisory Committee or through a dedicated agency. If a Heritage Advisory Committee is established, its mandate could include providing grants for heritage conservation projects. Because a Council advisory body is less likely to be able to fundraise than an arms’ length organization, a modest annual budget would have to be established to support the grant program. Community representatives could be appointed to the Committee and should represent the existing community heritage organizations. Similar advisory boards have six to ten members and have a mandate to advise Council on heritage matters but can also have a broader mandate. The *Heritage Management Plan* provides information on mandate and possible composition.

2.1.1.2 *Municipal Heritage Foundation (to Support Heritage Home Rehabilitation)*

As many of the identified heritage buildings in Cochrane are single-detached houses, one possible model for financial incentives could be a granting program operated through a Heritage Foundation. Examples of such grant programs in British Columbia include the Vancouver Heritage Foundation’s “True Colours” and “Restore It” programs, and the grant program offered by the Victoria Heritage Foundation since 1983. Cochrane may wish to establish a Municipal Heritage Foundation, which in addition to administering grant programs, could also serve an education and awareness function. A Foundation would also be able to actively fundraise to fulfill its mandate and establish an identity distinct from the municipal government. Matching funding could be sought for potential grant programs through corporate sponsorship, private foundations and other sources. If an incentive program was to be established, an annual grant budget of approximately \$5,000 from the Town could be considered a reasonable starting point in addition to the funds required to finance its administration.

Recommended Actions to Establish a Municipal Heritage Foundation:

- Step 1: Confirm feasibility of a Municipal Heritage Foundation that would provide financial incentives for the restoration of heritage homes
- Step 2: Formally establish the Foundation through a resolution of Council
- Step 3: Through Council, appoint a Board of Directors and identify an annual budget
- Step 4: Initiate a Fund Development Program that could include building an endowment, planned giving, patronage (Honourary and Active), and corporate sponsors

Further information on the establishment of a Heritage Foundation is provided in Appendix B. Seed money for the foundation could be provided by the funds received from the Cochrane Centennial Committee.

2.1.1.3 Municipal Tax Incentives

Currently, if a property owner undertakes a rehabilitation of a heritage building, he or she usually encounters an increased property tax assessment due to an increase in market value. This, combined with the high cost of meeting building code requirements, can make the upgrading of heritage properties a marginal economic proposition. Tax exemption is an appropriate tool to use in cases where a local government wishes to provide financial support to a property owner to encourage conservation of a heritage property. For example, tax exemption can be used to mitigate increases in property taxes, which may result from the higher assessment assigned to a restored heritage property.

Experience in the United States has demonstrated that incentives tied to income tax are amongst the most effective mechanisms for the preservation of heritage buildings. In Canada, federal income tax incentives for conservation do not currently exist, but municipal tax incentives have been proven to be successful in Winnipeg, Victoria and Edmonton. In 1988, the City of Edmonton became the first municipality in Canada to implement a tax incentive program based on property tax rebates. In 1998, the City of Victoria became the first municipality in British Columbia to institute a system of tax relief for heritage buildings. The City of Vancouver followed this action by offering, for the first time, tax incentives for conservation within several historic districts.

Tax incentives are a long-term investment, but are also economically empowering, as they assist in making marginal properties viable and eligible for full taxation in the future. It is recommended that, in principle, a tax incentive be based on a limited annual rebate system rather than any permanent adjustment of the assessment category for the heritage property. This is based on the premise that the funds allocated for a tax incentive in the short term will be returned to the municipality in the long term in the form of an increased assessment for a rehabilitated building.

The Town may also wish to offer the tax incentive program as a pilot program, to serve as an encouragement for owners to take advantage of the incentives and test the costs/benefits before instituting tax incentives as part of a permanent program.

Legal protection should be a prerequisite to receiving any form of tax incentive. The tax incentive would then fulfill the obligations under the Historical Resources Act to compensate the owner for any loss in economic value resulting from the legal protection.

Tax exemption may be used in one of two ways: for areas with a concentration of historic structures or for a single building. It may be used within an area containing properties that meet established eligibility criteria. Alternatively, tax exemption may be used on a site-by-site basis with criteria and terms designed to suit each property.

Tax exemption is a mechanism that allows Municipal Council to give property owners a partial or total exemption of their property taxes for approved heritage purposes, using one of the following options:

1. To exempt a percentage of municipal taxes based on improvements on designated buildings. This option does not necessarily reflect the unique characteristics and circumstances of individual properties or the differing costs of potential upgrading. Some sites may require much more work than others, so a flat percentage may not reflect a fair incentive for each project
2. Recommended, to institute one of two possible levels of tax incentive, which respond on a case-by-case basis to the costs of revitalizing heritage buildings:
 - To encourage full upgrading of heritage buildings, a significant incentive would be to rebate municipal taxes on approved rehabilitation improvements for up to a period of ten years. This tax incentive should be based on pre-established relevant heritage rehabilitation costs associated with the upgrading.
 - To provide a further inducement for rehabilitation, tax incentives in the form of a rebate could equal the amount of the net increase in taxes resulting from the difference between the assessed amount before rehabilitation and the assessed amount after rehabilitation. The rebate period may be applied for up to a ten year time period.

The City of Edmonton employs both of these tax rebate methods with the most popular method being a rebate that is specifically tied to the costs of rehabilitating the regulated portions of the heritage building up to a maximum of seven years.

How Can Tax Exemptions Be Instituted?

Four important components form a tax exemption program:

1. Through a process of planning, research, and consultation, a community identifies tax relief as the most appropriate way to assist in the conservation of heritage property in the community
2. Local government designs criteria for tax exemption eligibility, including the application procedure, expected improvements, conditions of tax exemption, legal protection of heritage property, rate and term of exemption, and repayment provisions

3. Local government monitors tax exempted properties to ensure compliance with the terms of the heritage protection and any requirements for maintenance, rehabilitation, or restoration
4. In the event of non-compliance, the local government may require repayment of exempted taxes

2.1.2 Non-Financial

Non-monetary support may be used by a community that (a) lacks the financial resources to provide direct financial incentives and/or (b) believes non-monetary support will be a more effective incentive than direct financial support.

2.1.2.1 Development Incentives

1. Density Bonus and Transfer Procedures

There are a number of circumstances under which a bonus density could be offered and/or transferred as an incentive for preservation. Bonus density should be calculated so that it relates directly to the cost of retaining significant heritage portions of the site.

Smaller bonus densities may be provided through a specific zoning or districting category tailored specifically to the development. Certain exemptions may be permitted to allow greater flexibility in cases where existing buildings already exceed the permitted density or do not comply with permitted siting requirements. For example, restored interior public spaces could be exempted from floor area calculations.

Density transfer may be a useful strategy in areas of significant development pressure where unused density on a site may be “sold” and transferred to a recipient site. The funds resulting from this purchased density would then be used to finance the rehabilitation of the donor heritage site. This tool is only effective where a recipient site is available and where this transfer is in keeping with the goals of the Municipal Development Plan.

Where a change to the existing land use district category is required, municipalities commonly apply a Special Land Use or Direct Control District (DC). DC districts or zones provide a way for the municipality to regulate and control the use and development of land and buildings within the category. This is useful where the specific requirements of a heritage building and its use would benefit from site specific or tailored zoning to ensure appropriate conservation measures.

2. Development Permits

The Development Officer may relax elements of the Land Use Bylaw requirements, with the exception of density and use through the Development Permit. Any such variances or relaxations should be subject to pre-established conservation standards/principles and guidelines.

3. Negotiated Agreements

A formal written agreement can be negotiated by a local government and an owner to protect a heritage property.

A heritage conservation agreement is a contractual agreement between a property owner and a local government or heritage organization. Heritage conservation agreements are intended to enable a local government or a heritage organization to negotiate an agreement with a property owner to protect and/or conserve a site or building. Such agreements may not alter local government regulations such as siting, use, or density. Conservation agreements are registered on the title of the property. The agreement outlines the responsibilities of the respective parties with respect to the conservation of a heritage property. Conservation agreements may apply to natural or built heritage resources. Such an agreement may be used to establish the amount, schedule, and details of the financial compensation negotiated with the owner in return for designation of the property, or it may be used to establish the conservation work program and required maintenance requirements.

A conservation agreement may be used to conserve property when planning and research identifies a need for conservation or when the parties are interested in formalizing the terms of conservation in a contract. A conservation agreement “runs with the land”, meaning that when the property is sold the conservation agreement remains in effect and shall be binding on the new owner.

4. Building Code Equivalencies

Building Code upgrading is the most important aspect of heritage building rehabilitation as it ensures life safety and long-term protection for the resource. Unfortunately the cost of life safety upgrading is often the largest disincentive for the rehabilitation of larger heritage buildings. These costs, if Codes are strictly interpreted, may be prohibitive. It is essential to consider heritage buildings on a case-by-case basis. Usually, blanket application of Code requirements does not recognize the individual requirements and inherent strengths of each building. Over the past few years, a number of Code equivalencies have been developed and adopted in the *National Building Code*, which makes heritage building upgrading more feasible. For example, the use of sprinklers in a commercial heritage structure helps to satisfy fire separation and exiting requirements.

Given that Code compliance is such a significant factor in the preservation of heritage buildings and areas, the most important factor is to provide viable economic methods of achieving building upgrading. To a certain extent, the use of Code equivalencies is discretionary. To provide consistent review and knowledgeable advice to building owners, municipal safety code officers should explore potential heritage building code equivalencies, as allowed in the *Alberta Building Code*.

To qualify for these equivalencies, a building must be provincially or municipally designated, incorporated in a registered agreement, or listed on the Cochrane Heritage Register.

2.1.2.2 *Administrative Support*

Streamlining the development and building permit application processes for heritage properties is a very desirable objective. Heritage property owners will balk at a complicated procedure if they are already concerned about costs. Heritage projects are sometimes more complex and can require additional review time. Therefore it is recommended that the heritage permit review procedure be simplified as much as possible.

2.1.2.3 *Heritage Support Programs*

The municipality can also provide support through:

- technical advice
- complementary public works projects in defined heritage character areas
- (such as street improvements like pedestrian lighting, paving, street furniture and way-finding signage)
- referral to other agencies or organizations for further assistance

2.2 PROVINCIAL HERITAGE CONSERVATION INCENTIVES

The following are the incentives currently available from the Provincial Government:

2.2.1 **Alberta Historical Resources Foundation**

The Alberta Historical Resources Foundation (AHRF) offers grants for heritage research and conservation in a variety of areas. One of the funding categories is Historic Resource Conservation. Grants may be awarded over any 5-year period for up to 50% of eligible costs according to the following grant ceilings for each category:

- | | |
|----------------------------------------------------------|---------------------|
| • Building Feasibility Studies/Plans: | maximum of \$25,000 |
| • Property Designated as a Provincial Historic Resource: | maximum of \$75,000 |
| • Property Designated as a Registered Historic Resource: | maximum of \$25,000 |
| • Property Designated as a Municipal Historic Resource: | maximum of \$25,000 |
| • Local Historic Resource: | maximum of \$ 5,000 |
| • Provincially Significant Cemeteries or Graves: | maximum of \$ 2,000 |

The AHRF also provides a maximum of \$5,000 for projects or to individuals who encourage or pursue heritage awareness, education or professional development.

The grant funding for the Registered Historic Resource category will be phased out after the next five-year funding period, 2004-2009.

2.2.2 **Municipal Heritage Partnership Program**

The MHPP is a new, evolving provincial program designed to support the development of municipal heritage programs. The MHPP currently connects federal Historic Places Initiative funding to Alberta's municipalities, providing assistance for the identification of historic resources, for the development of heritage resource management plans, policies and programs, and for the implementation of municipal designation programs. Since the Town of Cochrane already has the *Heritage Register and Management Plan* in place, it is well positioned to request assistance for the implementation of its programs.

2.3 FEDERAL HERITAGE CONSERVATION INCENTIVES

A significant opportunity is presented by new federal initiatives for the conservation of built heritage. In 1999, the federal government made a renewed commitment to the conservation of the country's built heritage, and is currently preparing a Canadian Register of Historic Places, national conservation standards and guidelines, and financial incentives. Any financial benefits from this program will be limited to incorporated revenue-generating properties.

2.3.1 Commercial Heritage Properties Incentive Fund (CHPIF)

The federal government currently offers a financial incentive derived from the National Historic Places Initiative program. It is called the Commercial Heritage Properties Incentive Fund (CHPIF). The federal government, through the CHPIF, will reimburse up to 20% of eligible costs for the rehabilitation of commercial properties up to a maximum of \$1 million. The fund is administered by Parks Canada and is financed for 3 years with a budget of \$10 million per year.

In order to be eligible, a property must be on the Canadian Register of Historic Places and be owned or leased by a taxable Canadian corporation. Once a property is accepted in the program, all rehabilitation and conservation work will be subject to the Standards and Guidelines for the Conservation of Historic Places. This new incentive program is linked to the Historic Places Initiative (HPI), which the federal government is administering with provincial governments to create Canada's Register of Historic Places.

2.4 OTHER FUNDING ASSISTANCE

Additional funding assistance may be available through a wide variety of other government and private programs. Private foundations may also be willing to support local heritage conservation efforts. One example of this type of funding is the Samuel and Saidye Bronfman Family Foundation, one of Canada's major private granting foundations. The Foundation's Urban Issues Program supports innovative, community-based approaches to urban conservation. To date, sixty community groups across Canada have received financial support for projects focused on issues such as affordable housing, food sustainability, protection of urban spaces, alternative transportation and the cultivation and preservation of cultural traditions. Past recipients have included the Community Action Project for the Renewal of North Central Edmonton, the Alberta Avenue Community League Community Action Project (Edmonton), the Mole Hill Living Heritage Society Gardens and Tours Project (Vancouver), and the Strathcona Porch Project (Vancouver). Further exploration of available funding sources may reveal other applicable funding, especially for non-profit organizations.

2.4.1 Residential Rehabilitation Assistance (RRAP)

RRAP programs offered through the Canada Mortgage and Housing Corporation help low-income Canadians, people with disabilities and Aboriginals live in decent, affordable homes. These programs also support renovations to rooming houses and rental units to increase the availability of housing for those in need. Depending on the individual situation for each resource, one of the following programs may apply:

2.4.1.1 Homeowner Residential Rehabilitation Assistance Program (Homeowner RRAP):

Financial assistance to repair substandard housing to a minimum level of health and safety.

2.4.1.2 Rental Residential Rehabilitation Assistance Program (Rental RRAP):

Assistance for landlords of affordable housing to pay for mandatory repairs to self-contained units occupied by low-income tenants.

2.4.1.3 Residential Rehabilitation Assistance Program (RRAP for Persons with Disabilities):

Assistance for homeowners and landlords to improve accessibility for persons with disabilities.

2.4.1.4 Rooming House Residential Rehabilitation Assistance Program (Rooming House RRAP):

Repair assistance for owners of rooming houses with rents affordable to low-income individuals.

2.4.1.5 Residential Rehabilitation Assistance Program (RRAP for Conversions):

Assistance for converting non-residential buildings into affordable housing.

2.4.2 Other Provincial Funding Programs

The Province of Alberta offers grant programs that may assist owners with mechanical and technical upgrades or repairs and improvements to their buildings. The Community Facility Enhancement Fund and the Community Initiatives Program, offered through the Alberta Gaming Lottery Funding Programs, are two such programs that may assist owners of community or institutional buildings.

2.4.2.1 Community Facility Enhancement Program (CFEP)

The Community Facility Enhancement Program (CFEP) provides financial assistance for the expansion and upgrading of Alberta's extensive network of community-use facilities (2003-04 funding estimate \$38.5 million). CFEP provides matching grants to municipalities, First Nations, Metis Settlements, and registered community non-profit groups to build, purchase, repair, renovate, or otherwise improve eligible facilities. The matching requirement may be met in the form of a combination of money, volunteer labour, services, or donated materials or equipment for the project. The maximum amount of this grant is \$125,000 per year per project. Applications can be made any time throughout the year.

2.4.2.2 The Community Initiatives Program (CIP)

The Community Initiatives Program (CIP) provides funds from the Alberta Lottery Fund to enhance and enrich project-based community initiatives throughout Alberta. Funding is based on local needs and priorities, in accordance with provincial guidelines. The Community Initiatives Program is a matching grant program. The matching requirement may be met in the form of a combination of money, volunteer

labour, services, or donated materials or equipment for the project. Community not-for-profit groups, including those registered under the *Societies Act*, the *Agricultural Societies Act* and the *Cemeteries Act* are eligible to receive funding. Community organizations that are not registered may have a sponsor apply on their behalf. Only one CIP application can be submitted for a specific project in each fiscal year (i.e., April 1 to March 31). A maximum grant request up to \$75,000 per project per year will be considered.

2.5 RECOMMENDED ACTIONS

It is recommended that the Town of Cochrane undertake the following steps as part of its development of a heritage conservation incentives program:

- Confirm those incentives already in place
- Identify any additional incentives and programs which are not yet provided and which may be most appropriate to devote to municipal resources
- Actively promote and market the range of incentives to owners of heritage properties. This may be done by holding meetings, distributing brochures, and posting information on the Town's website
- Negotiate with heritage property owners to ensure that incentives are applied in a flexible manner to suit each individual situation
- Monitor program co-ordination annually, assess the success of individual projects, and make adjustments as necessary to allocate more resources as needed

3.0 PUBLIC AWARENESS PROGRAMS

In the Town of Cochrane *Heritage Management Plan*, 2002, one of the elements identified as integral to a successful heritage management program is the development of heritage awareness programs. One of the most effective ways to build and maintain respect for a community's heritage is through a selection of activities that raise public awareness and increase appreciation of its history. The following community groups, Cochrane's dedicated volunteer base, could play a major role in implementing these heritage awareness programs:

3.1 COMMUNITY GROUPS

Cochrane is fortunate to have existing heritage societies with which to build and co-ordinate programming opportunities. Support for these community organizations and their activities will only strengthen the ties that lead to more collaboration in the administration and delivery of these programs. The following groups actively supporting heritage conservation in the community include:

3.1.1 Cochrane and Area Heritage Association

Established in 1978, the Association promotes heritage in Cochrane and the immediate surrounding area through:

- Heritage Art Award—\$100.00 and a certificate given to a student at Cochrane High School who portrays a heritage event or structure in their art (juried award). It is awarded in conjunction with the Cochrane Art Club
- Heritage Award—\$200.00 given to the student at Cochrane High School who exhibits the highest mark in Social Studies 30
- Restoration of structures by raising funds and securing grants from various institutions including the Alberta Historical Resources Foundation
- Lobbying of Town Council to provide heritage names for various community parks and sites

3.1.2 Cochrane Historical and Archival Preservation Society (CHAPS)

Established on July 31, 1999, the Cochrane Historical and Archival Preservation Society mission statement is to identify, protect, present and preserve historic sites of Cochrane (Old Town Cochrane, pre 1975), and to collect and protect both tangible and intangible representations from the past, i.e., both things and stories. CHAPS activities have included:

- Inventory of buildings and sites
- Tours and 2003 tour book (\$5.00) "Under the Big Hill" (historical buildings that are still standing)
- Tours of the original townsite
- Updating of *Big Hill Country*
- Fundraising to save heritage structures from demolition. Goal is to retain and move structures onto a common tract of land (currently the All Saints Anglican Church, the Davies Home and Hospital)
- Plaque program for heritage homes planned for 2004
- Fund-raising dinner (Twice a year in April and November)

- Collection of archival photos of Cochrane
- Displays of artifacts in schools
- Heritage Awareness displays at local library
- Heritage Homecoming Weekend for Cochrane's 100th Birthday in August

3.1.3 Cochrane Settlement Community Association

Established in 2002, the Cochrane Settlement Community Association formed as a result of the adoption of the *Lower East Neighbourhood Plan*. Objectives of the Association include:

- Dedication to the betterment of the community and a vehicle for advancing the needs and concerns of residents in East Cochrane
- Provision of a meeting place for the community to discuss topical community issues
- Support, maintenance, and preservation of the historical character of the area
- Opportunities for social activities

3.1.4 Cochrane and District Chamber of Commerce

The Cochrane Chamber is active in helping Cochrane and immediate surrounding area businesses by facilitating membership within the Alberta Chamber of Commerce. The 275 members have access to group policies and credit discounts, in addition to various other benefits. The mandate of the Cochrane Chamber is to work with local businesses to aid them in achieving their goals. The Cochrane Chamber has taken an active role in the following community events:

- Christmas Light-Up Campaign
- Small Business Week & Awards
- Labor Day Parade
- Annual Trade Show

3.1.4 The Stockman's Memorial Foundation

The mandate of the Foundation is to identify, honor and remember the builders of the Alberta Livestock Industry and others who have made outstanding contributions to its progress. The membership of this organization is about 300. Membership fees are \$25.00/year, open to all. Additional information can be found on the group's website.

3.1.5 Cochrane Ranche Hands Association

The mandate of the group is to preserve and interpret the Cochrane Ranche Historic Site, which the Association operates from mid-May to Labour Day. The programs and activities of this group include:

- interpretive programs
- children's programs
- flora and fauna displays
- trail upgrades
- rebuilt historic corrals
- interpretation of footprints of original ranch and bunk houses
- on-going collection of all old brick on ranch site and creamery
- annual Heritage Day events
- annual Dominion Day Tea, July 1st

3.2 PROPOSED PUBLIC AWARENESS PROGRAMS

The following are examples of the types of events that invite public interest and participation. In many municipalities, these kinds of events are jointly sponsored or managed with community-based societies who may choose to take the responsibility for administering these programs.

3.2.1 Plaque or Interpretive Program

A commemorative plaque program could be promoted that identifies buildings on the Register and provides historical information for tourists and residents alike. Interpretive plaques also help to stimulate self-guided walking tours.

3.2.2 Special Events

Some community groups hold regular historical lectures on a range of topics of interest to the community. Most communities and regions are richly endowed with people who are knowledgeable about a variety of topics from the past that would be of interest to current residents. Historical enactments are also crowd-pleasers especially if they are linked to a special anniversary or local legendary events.

3.2.3 Walking Tours

Walking tours are also a popular way of arousing people's interest in their neighbourhood histories. Walking tours are already offered in the community and should be continued and broadened through more research into community and family histories. These may be self-guided tours with the help of brochures or group tours led by volunteers. Local historians often have anecdotal accounts about specific buildings and places that give special flavour to walking tours. Cemetery tours have become a favorite in many communities due to their attractive settings and the many stories that can be told about the families and individuals who rest there.

3.2.4 Annual Programming

Heritage Week in February is celebrated in many communities through a series of special events that are directly linked to their own local history. In Alberta, Family Day coincides with Heritage Day thereby presenting an ideal opportunity to celebrate these kinds of special events. Special lectures, a proclamation by Town Council, special programming in the schools and a banner to advertise Heritage Week are all ways that the Town can raise the profile of the community's heritage. Another possibility is Cochrane's Birthday, June 17th.

3.2.5 Doors Open Cochrane Event

The aim of Doors Open is to facilitate people's understanding and enjoyment of their local architectural environment while encouraging awareness of their built heritage. The immense popularity of Doors Open events reveals people's curiosity about buildings and about history. A Doors Open event captures our imagination by allowing us the opportunity of entering inside those spaces—to eagerly venture through doors and discover the inner workings of a place—why it is there, who designed and built it, its purpose today, its story within a neighbourhood, what secrets it may hold. Heritage Canada is bringing Doors Open Canada to Canadians. Its primary role in overseeing the Doors Open Canada program is an inspirational and

promotional one focusing on the principles of access, awareness and advocacy. Municipal councils and civic societies then take the lead and invite other local voluntary organizations and owners to join them. The Town of Cochrane could consider sponsoring such an event, in conjunction with local heritage groups.

3.2.6 Heritage Home Workshops

Many owners of heritage homes have a keen interest in repairing, rehabilitating or restoring the interiors and exteriors of their homes. Workshops that feature experts with specialties in such areas as millwork, repairing original windows or historic paint colours can be extremely popular. Resource materials to assist with technical workshops are available through Alberta Community Development in the form of publications and potentially through staff resources.

3.2.7 Heritage Recognition Awards

Once the heritage management program has been established for a few years, the Town might be interested in launching an awards program to bring recognition to both the heritage properties and their owners for undertaking recent rehabilitation or restoration projects. This is a way of raising the profile of the value of conservation practices as well as building pride in the community. The Heritage Advisory Committee may be the agency that administers the awards through specific eligibility criteria.

3.2.8 Liaison with Other Municipalities and Heritage Groups

The Town may wish to liaise and co-ordinate with other municipalities in their heritage programs, other resource organizations, and local historical societies (CHAPS and Cochrane and Area Historical Society). Having a network of other agencies and organizations with which to share information and co-ordinate events would be advantageous. This is especially true in the area of heritage awareness programming.

3.3 RECOMMENDED ACTIONS

It is recommended that the Town of Cochrane undertake the following steps as part of its development of heritage awareness programs:

- Position co-ordination of the Public Awareness Program within the framework of the Heritage Management Plan
- Identify the types of heritage awareness partnership activities/events that the municipality and the volunteer organizations can jointly engage in
- Identify the level of both municipal and volunteer-based support available through financial and human resources to allocate to heritage awareness activities
- Work with local volunteer groups to design an annual program of activities, events and ongoing initiatives and consider promoting at least one annual event held each year at the same time (e.g., Heritage Week in February – or Cochrane’s birthday in June)
- Assist in the marketing and promotion of all activities and programs
- Monitor program co-ordination annually, assess the success of each event and activity, and make adjustments as necessary to allocate more resources as needed

4.0 IMPLEMENTATION

Implementation of the recommended incentives and public awareness activities in this document should be undertaken in steps. Depending on time, resources, and the levels of community support and political will, these steps may be followed sequentially or adapted and integrated into municipal processes as prioritized by staff and Town Council. These incentives and heritage awareness programs should be implemented within the framework of the *Heritage Management Plan* adopted by Council. Ideally, prior to implementation, the Town will have established a Heritage Advisory Committee. Also recommended to be in place prior to embarking on an incentives program is a process for reviewing applications affecting heritage properties in the *Heritage Register*.

- Step 1: Confirm those incentives and heritage awareness programs already in place and administered by existing heritage organizations.
- Step 2: Identify incentives and programs which are not provided and which may be most appropriate to devote to municipal resources. Some of these may be relatively systematic to implement such as development relaxations, building code equivalencies, and streamlining processing procedures. Others may take more time to research, administer, and adopt (grant program, tax incentives, Heritage Foundation).
- Step 3: Actively promote and market the range of incentives to owners of heritage properties. This may be done by holding meetings, distributing brochures, and posting information on the Town's website.
- Step 4: Support and respect the activities of existing heritage organizations in the community as itemized in Section 3.2.1 of this document. Work to co-ordinate events and broaden support for heritage activities in the community.



First Street, late 1920s or 1930s
(Glenbow Archives NC26-206)

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Province of Alberta

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APPENDIX A

HERITAGE CONSERVATION INCENTIVES CASE STUDIES

Property	Category	Financial Incentives				Non-Financial Incentives		
		Conservation Grants	Municipal Grants	Municipal Tax Incentives	Other Funding Assistance	Development Incentives	Administrative Support	Heritage Support Programs
Webster Residence 620 Second Street West	Residential	yes	yes	yes	yes	yes	yes	yes
Lord Fin Fish & Chips 416 First Street West	Commercial	yes	yes	yes	yes	yes	yes	yes
King Solomon Lodge 120 Centre Avenue	Institutional	yes	yes	no	yes	yes	yes	yes

SAMPLE APPLICATION MATRIX

RESIDENTIAL CASE STUDY

Webster Residence 620 Second Street West



HISTORY

Prominent local builders, the Chapman Brothers, built the Webster residence, clad with Cochrane brick, in 1912, for Russell Alfred Webster. Webster, who had a feed mill business, machine agency, and a real estate business, owned the house until 1934. Bernard Klassen, owner of Klassen Hardware and a former Mayor of Cochrane, owned the house from 1935 to 1957.

ISSUES

Currently, the building continues to serve a residential function. There are no immediate threats to the site. If it is converted to full or partial commercial use, provision of sufficient parking on-site may be an issue. The owner could use assistance with the ongoing costs of building restoration.

POTENTIAL FINANCIAL CONSERVATION INCENTIVES

- Conservation Grants: could be provided by the municipality for heritage restoration
- Municipal Heritage Foundation: if a Foundation is set up, could provide grants for heritage restoration
- Municipal Tax Incentives: a ten year municipal tax abatement for this property could provide an incentive of approximately \$14,000 at the current level of tax assessment

- Other Funding Assistance: other programs could be explored to determine eligibility. If municipally designated, funding could be received through the Province. While in residential use, it would not be eligible for the Commercial Heritage Properties Incentive Fund

POTENTIAL NON-FINANCIAL CONSERVATION INCENTIVES

- Development Incentives: a density bonus could be negotiated or other development requirements (such as parking) could be varied, especially if the use changes to commercial
- Administrative Support: the municipality can facilitate the conservation of the site through support during any application process
- Heritage Support Programs: the municipality can facilitate the conservation of the site through technical advice

SUMMARY

The Webster Residence is in a very good position to receive sufficient heritage incentives to achieve full building rehabilitation and restoration. This is true whether it remains in residential use or converts to commercial use. The incentives would be contingent on the site receiving municipal historic resource designation.

COMMERCIAL CASE STUDY

Lord Fin Fish & Chips
416 First Street West



HISTORY

The Chapman Brothers as the contractors built this house in 1906 for Robert Chapman. The twin Chapman Brothers, Andrew and Robert, were the “foremost builders” within Cochrane. Robert Chapman owned the house until 1946, after which Mrs. A. Chapman owned it. The current owner has now converted it to commercial use.

ISSUES

This building currently serves a commercial function. There are no immediate threats to the site. There is an issue of conformance with the land use bylaw, especially regarding provision of sufficient parking on-site. The owner could use assistance with the ongoing costs of building restoration.

POTENTIAL FINANCIAL CONSERVATION INCENTIVES

- Conservation Grants: could be provided by the municipality for heritage restoration
- Municipal Heritage Foundation: if a foundation is set up, could provide grants for heritage restoration
- Municipal Tax Incentives: a ten year municipal tax abatement could provide an incentive worth approximately \$35,000 at the current level of tax assessment
- Other Funding Assistance: other programs could be explored to determine eligibility. If municipally designated, funding could be received through the province. Additionally, the

historic significance of the site may warrant provincial heritage designation, which could establish a higher level of available funding. The site would also be eligible for the Commercial Heritage Properties Incentive Fund

POTENTIAL NON-FINANCIAL CONSERVATION INCENTIVES

- Development Incentives: a density bonus could be negotiated, or other development requirements (such as parking) could be varied
- Administrative Support: the municipality can facilitate the conservation of the site through support during any application process
- Heritage Support Programs: the municipality can facilitate the conservation of the site through technical advice

SUMMARY

Lord Fin Fish & Chips is in a very good position to receive sufficient heritage incentives to achieve full building rehabilitation and restoration. The incentives would be contingent on the site receiving municipal historic resource designation, and additionally the site may be eligible for provincial historic resource designation.

INSTITUTIONAL CASE STUDY

King Solomon Lodge
120 Centre Avenue



HISTORY

This structure was originally in Mitford, as a saloon, *circa* 1891. The building was brought over the Big Hill Creek to Cochrane, *circa* 1898, and was occupied as a school, and when a new brick school was constructed, it was used as the gymnasium. It was moved to this site and converted into a hall in *circa* 1930 and occupied by the Masons (Masons were originally in the C.W. Fisher Block that burned in 1927). Past Lodge Masters included Alexander Moore (former Cochrane area MLA) and Thomas Quigley.

ISSUES

The King Solomon Lodge continues to serve an important institutional and community function. There are no immediate threats to the site, other than significant issues related to building preservation and upgrading. There is an issue of conformance with the land use bylaw, especially regarding provision of sufficient parking on-site as well as *Alberta Building Code* issues. The owner could use assistance with the ongoing costs of building restoration.

POTENTIAL FINANCIAL CONSERVATION INCENTIVES

- Conservation Grants: could be provided by the municipality for heritage restoration
- Municipal Heritage Foundation: if a Foundation is set up, could provide grants for heritage restoration
- Municipal Tax Incentives: a municipal tax abatement would be of minimal or no effectiveness as an incentive

- Other Funding Assistance: other programs could be explored to determine eligibility. If municipally designated, funding could be received through the Province. Other provincial programs that could also provide assistance include the Community Facility Enhancement Program and the Community Initiatives Program

POTENTIAL NON-FINANCIAL CONSERVATION INCENTIVES

- Development Incentives: a density bonus could be negotiated, or other development requirements (such as parking) could be varied; *Building Code* equivalencies for issues such as building access and egress could be sought to prevent actions that could disfigure or damage the building due to required safety regulations
- Administrative Support: the municipality can facilitate the conservation of the site through support during any application process
- Heritage Support Programs: the municipality can facilitate the conservation of the site through technical advice

SUMMARY

King Solomon Lodge is in a very good position to receive sufficient heritage incentives to achieve full building rehabilitation and restoration. Many of the incentives would be contingent on the site receiving municipal historic resource designation.

APPENDIX B

ESTABLISHING A HERITAGE FOUNDATION

If the Town of Cochrane wishes to consider establishing a municipal Heritage Foundation, the following procedure is an outline of how such a body could be established.

Step One: Confirm Feasibility

The feasibility of establishing a heritage foundation should be studied, including an examination of other similar organizations., and a confirmation of Council's desire to undertake this initiative.

Step Two: Formally Establish the Foundation, and appoint a Board of Directors

The Board of Directors would be responsible for increasing public and private sector involvement and investment, distributing funds according to developed allocation processes, developing policies for the programs undertaken by the organization, and prudently managing the Foundation's assets:

- **Governance**

The Board would establish the mission, purpose, and long-range objectives of the Foundation, and amend them as necessary to ensure that they remain relevant to the Foundation's evolving role. The Board would be responsible for formulating and approving policies consistent with the Foundation's purpose, public trust and financial capabilities, and for regularly monitoring progress in implementing these policies. Through the formation of subcommittees, the Board would control the programs and operations of the Foundation.

- **Advocacy**

The Board would have a responsibility to communicate to the public and elected representatives the mission and purpose of the Foundation, and to advocate both greater public involvement in the Foundation's activities and increased moral and financial support for the Foundation.

- **Fundraising**

Board members would be responsible for ensuring that the Foundation could meet its financial responsibilities. Board members, both individually and collectively, would be responsible for raising funds for the Foundation from both public and private sources, and using their influence to assist in raising these funds.

Step Three: Undertake a Fund Development Program

The Foundation could receive stable funding from:

- Annual funding by Council
- Stable funding from a designated municipal source such as increased demolition permit fees or a percentage of building permit fees
- A one-time municipal endowment

The Foundation should also pursue the potential for setting up or developing an endowment fund that could help fund ongoing operations. This fund could be grown through active solicitation of financial gifts, strategies for garnering bequests and other planned gifts. Most

fund development plans are multifaceted, encompassing a combination of annual fundraising through events, major gifts and planned giving. The following plan for fund development recognizes that there are additional ways that fundraising could be approached:

- **Building an Endowment**
To create interest income of \$10,000 per year, a minimum endowment of \$200,000 would have to be created. For a small organization this is an ambitious goal, and it may take three to five years to achieve this.
- **Planned Giving**
Planned giving is the most long term type of fund development, and it takes an average of fifteen years to actually benefit from a bequest. Approaches must be made to two groups: lawyers and accountants who advise clients on financial estate planning, and individuals who may be approached directly for a bequest.
- **Patronage (Honourary and Active)**
This is an important part of fundraising efforts, as Patrons set the tone for community involvement. Honourary patrons could be appointed to promote the prestige of the site; you can never aim too high when seeking a “name” to attach to an organization.
- **Corporate Sponsors**
Opportunities for corporate sponsorship should be actively pursued. One of the natural fits between heritage conservation and corporate self-interest is in the home renovation area. Hardware stores, paint companies and home renovation contractors are interested in heritage education and awareness as it often has direct business benefits; an example is the Benjamin Moore Company’s ongoing sponsorship of the Vancouver Heritage Foundation’s True Colours grant program.

APPENDIX C

WEBSITE ADDRESSES

Municipal

Town of Cochrane

<http://www.cochrane.ca/> or <http://www1.cochrane.ca>

Provincial

Alberta Historical Resources Foundation (AHRF)

<http://www.cd.gov.ab.ca/preserving/heritage/ahrf/index.asp>

AHRF Historic Resource Conservation

<http://www.cd.gov.ab.ca/preserving/heritage/ahrf/partnership/preservation/index.asp>

ARHF Heritage Preservation Partnership Program

<http://www.cd.gov.ab.ca/preserving/heritage/ahrf/partnership/index.asp>

Alberta Gaming - Lottery Funding Programs

Community Facility Enhancement Program

<http://albertalotteryfund.ca/grants/cfep.asp>

Community Initiatives Program

http://albertalotteryfund.ca/grants/community_initiatives.asp

Federal

Commercial Heritage Properties Incentive Fund

http://www.pc.gc.ca/progs/plp-hpp/plp-hpp2a_E.asp

Residential Rehabilitation Assistance Programs (CMHC)

<http://www.cmhc-schl.gc.ca/en/prfias/rerepr/index.cfm>

Other

The Stockman's Memorial Foundation

www.smflibrary.ca

Bronfman Foundation

<http://www.bronfmanfoundation.org/urban/indexenglish.htm>

Doors Open Canada

<http://www.doorsopencanada.ca/english/aboutdoorsopen.html>

Vancouver Heritage Foundation

<http://www.vancouverheritagefoundation.org/>