

# Strategic Plan for the Heritage Trust of Nova Scotia

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This Strategic Plan for the Heritage Trust of Nova Scotia will guide the decisions and actions of the Trust over the next three years (2012 – 2015), after which the timeframe can be extended or the plan refreshed to ensure a current and relevant plan remains in place. The plan below outlines our vision and the three integrated strategic directions necessary to realize that vision: strengthening the Trust's influence and relevance; fostering a more educated and engaged public and supporting conservation projects. In addition, two areas have been identified where the Trust must extend capacity if it's to realize its fullest potential: strengthening administrative support and board governance, and improving the Trust's financial position.

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## **Our Mission**

The Heritage Trust of Nova Scotia promotes public interest in and the conservation of buildings and sites of historical or cultural significance to Nova Scotians.

## **Our Vision**

Nova Scotia's heritage structures, sites and areas are understood to enhance quality of life, contribute to the province's distinctive sense of place, and provide social, economic and sustainability benefits for present and future generations. These assets are cherished and well protected through a combination of regulatory, fiscal and technical supports. There is widespread adoption of best practices in relation to the conservation, management and care of heritage assets.

## **Our Core Beliefs**

Heritage buildings, structures, and sites are a living legacy of our history. They contribute to the quality of life for residents, communities and visitors. Retaining them is socially and environmentally responsible, and supports economic development.

## **Our Strategic Directions**

### **Strategic Direction #1 - *Strengthen the Trust's Influence and Relevance***

#### **Objective**

To positively influence decisions made by governments, donors, communities and property owners in favour of heritage conservation.

#### **Initiatives to Achieve Objective**

1. undertake research that effectively supports Trust positions and results in decisions that advance conservation efforts

#### Actions:

- i. establish a multi-year research strategy aligned with the objectives and priorities of the Trust

- ii. develop briefing documents and other materials that:
    - illustrate the full array of proven benefits of heritage conservation
    - outline Trust positions and the rationale behind them
    - profile successful conservation initiatives and promote best practices
    - raise the profile and accessibility of our research
  - iii. expand research capacity by:
    - contracting researchers (professional or students) to do data gathering
    - strengthening links with academic advisors at Nova Scotia universities and colleges
2. become more active with local heritage groups and help them to grow stronger

Actions:

- i. develop a directory of all the groups and their key personnel in the province with an interest in heritage conservation and their principal interests, activities, expertise and accomplishments and make it accessible
  - ii. strengthen relationships with and support of local heritage groups by:
    - extending access to Trust resources and expertise
    - partnering on a limited number of strategic initiatives
    - connecting and communicating regularly with them
3. position the Trust as a relevant and collaborative force in advancing heritage conservation and promotion with a larger number of individuals, groups and communities across the Province

Actions:

- i. pilot a new engagement model with the Heritage Cape Breton Connection whereby:
    - HTNS provides a modest annual grant to support the Heritage Cape Breton Connection's built-heritage activities
    - HCBC members automatically become Heritage Trust members
    - the two organizations establish a joint Built Heritage Committee
4. raise our profile and deepen our relationships

Actions:

- i. substantially raise the profile of the Trust as a positive force for protecting heritage assets through:
  - an array of communications vehicles
  - public appearances/presentations
  - strong web and social media presence
- ii. strengthen relationships and influence with those who have jurisdiction over heritage decision making (e.g. government agencies, developers, councils, planning advisory boards, advisory committees, etc.) by:
  - facilitating exposure to exemplary conservation projects locally and in other jurisdictions
  - establishing strategic partnerships to plan for adaptive re-use of buildings
  - improving relations with elected officials, government agencies and developers

- supporting heritage planners workshops to:
  - raise the level of understanding of conservation standards
  - profile successful conservation initiatives and
  - promote best practices e.g. creation of Heritage Conservation Districts, inventory of heritage assets
- gaining Trust participation in annual meetings of the Union of NS Municipalities

### ***Strategic Direction #2 – Foster a More Educated and Engaged Public***

#### Objective

To facilitate decision makers' and the public's...

- a) understanding that heritage buildings, structures, and sites enhance quality of life, contribute to sense of place, and provide many benefits to society, and
- b) adoption of the Standards and Guidelines for Conservation of Historic Places in Canada and best practices

#### Initiatives to Achieve Objective

1. expand the public's knowledge and appreciation of the value of conservation and how to access the supports available

Actions:

- i. establish mechanism and capacity to respond to issues or opportunities to raise the public awareness
- ii. expand array of attractive articles, publications and videos (or links to them) on the Trust's web site
- iii. develop or support the offering of a limited number of highly relevant and high profile public engagements (e.g. workshops, events, heritage fair, public speeches)
- iv. advocate for and assist with the incorporation of heritage elements into the public school curriculum
- v. strengthen relations with university and community college programs

### ***Strategic Direction #3 – Support of Conservation Projects***

#### Objective

To expand the array of supports for heritage conservation.

#### Initiatives to Achieve Objective

1. connect with, energize, and provide access to resources to individuals in the heritage community

Actions:

- i. revitalize and manage the web site (with assistance of a web manager) so that it provides current, attractive and engaging...
    - information about conservation projects and their benefits
    - directories of supports and how to access them (specialized materials, talent, financial, etc.)
    - instructional how-to resources with visuals
    - access to Griffin (searchable) and research (to review or to contribute)
  - ii. utilize social media to appeal to younger audiences and broadcast quick, easy and far reaching messages on heritage matters
  - iii. establish categories of Trust membership and services/benefits that appeal directly to:
    - owners/residents of heritage buildings
    - members of local historical societies
  - iv. provide consulting, advising or mentoring program to link individuals in the heritage community with others who can provide expertise
2. seek tax concessions/incentives that encourage conservation projects for both residential and commercial purposes

Actions:

- i. approach government with proposal to put tax incentives in place
3. recognize and reinforce advancements made at the municipal level

Actions:

- i. establish an award for municipalities for improvement of heritage policies and programs

## **Capacity We'll Need to Develop to Pursue Our Strategic Directions**

### ***A –Strengthen Administrative Support and Improve Board Governance***

#### Objective

To ensure appropriate administrative supports and Board structures are in place to effectively achieve the Trust's objectives without undue burden on volunteers.

#### Initiatives to Achieve Objective

1. institute an appropriate system for administrative support

Actions:

- i. establish a Transition Working Group to consolidate in one document and present to the Board
  - a profile of all the administrative needs of the Trust
  - areas where improvement in our current practices would result in efficiencies

- fully developed alternatives for administrative support
  - ii. develop a transition strategy and oversee implementation of new system
- 2. review the size, structure and activities of the Board and committees (e.g. frequency and venue of meetings, split between volunteer and commercial activities/responsibilities, etc.) and improve effectiveness where appropriate

Actions:

- i. Transition Working Group will:
  - assess the extent to which Board composition and activities reflect a provincial orientation and recommend any adjustments required to structure or functioning
  - review suitability of current committee structure to meet the ongoing requirements of the Trust and achieve the objectives outlined in the strategic plan and recommend any adjustments required
  - work with Nomination Committee to identify Chair for each committee
  - work with Committee Chairs to outline the mandate, objectives, activities and composition for committees
  - review and develop recommendations on Board size, structure, practices and development of the Board

## ***B - Improve Our Financial Position***

### Objective

To increase the financial resources available to support Trust activities.

### Initiatives to Achieve Objective

- 1. pursue a variety of means to strengthen our financial position

Actions:

- i. develop a multi-year, multi-faceted strategy which may include:
  - expanded fund-raising responsibilities of the Board
  - planned giving
  - stock contributions
  - corporate matching initiatives
  - expanded membership
  - re-structuring investments
- ii. review current financial management practices and ensure appropriate systems are in place