

## Heritage Matters Community Heritage Benchmark Worksheet

Name of community

Date of assessment

### What is Heritage Matters?

As partners in heritage conservation, Manitoba's communities play an important role in protecting, promoting and celebrating our heritage. Heritage Matters is a community heritage performance measurement and development initiative that can help communities understand their strengths, engage local partners and make the most of their heritage resources.

In 2008, community officials who complete a performance self-assessment, using the Heritage Matters benchmark worksheet, and are interested in completing a project that identifies, protects or conserves historic places can apply for Heritage Matters funding (up to 50 per cent matching, \$5,000 maximum per applicant) provided through a provincial-municipal contribution agreement. See the Heritage Matters Project Guidelines for more information.

### How should the benchmarks be used?

The Heritage Matters benchmark worksheet includes questions in eight areas, each with an assigned point value. Each question refers to an established best practice in the community heritage field. Questions are designed to be answered in a "yes or no" style with 'yes' answers receiving full points. There are no partial points awarded.

Community heritage organization staff or municipal officials can complete the worksheet and tally their points to determine their performance. While it is unlikely that any community will achieve the maximum score of 100 points, the score is a baseline from which new projects or directions maybe planned. Your community's strengths and weaknesses may come to light as you complete the worksheet, possibly stimulating discussion about local heritage.

Because the benchmarks are designed to fit any community, it is possible that certain questions may not apply to you. This is not a problem because the worksheet is designed only to provide an overview of how heritage is managed in your area. If appropriate, notes about local projects or approaches can be made in the space provided.

## Who can I contact for support for Heritage Matters?

It may be helpful to have an outside facilitator work with you to complete the worksheet. If requested, Historic Resources Branch staff is available to meet with you in person or through teleconferencing to help you complete your assessment. For more information or to request a meeting, contact the Municipal Liaison Officer at 204-945-2981 (toll free 1-800-282-8069, ext. 2981) or e-mail to [hrb@gov.mb.ca](mailto:hrb@gov.mb.ca).

| Requirement                   | Benchmark  | Desired Actions   | Point Value | Your Score | Notes |
|-------------------------------|--|---|-------------|------------|-------|
| <b>Community Requirements</b> | 1. Active heritage volunteers exist within the community   | <ul style="list-style-type: none"> <li>• an active volunteer base exists</li> <li>• volunteers are actively recruited</li> <li>• public recognition of volunteers' efforts</li> </ul>   | 3<br>2<br>2 |            |       |
|                               | 2. Community awareness policies/procedures are in place  | <ul style="list-style-type: none"> <li>• regular sharing of planned heritage initiatives to the community</li> <li>• planned community heritage awareness initiatives and/or participation in recognized heritage events</li> </ul> | 2<br>3      |            |       |
|                               | 3. Existence of Municipal Heritage Advisory Committee, Historical Society or similar community heritage organization | <ul style="list-style-type: none"> <li>• group meets regularly, follows an agenda, and keeps minutes</li> <li>• group has a mission statement and defined roles and responsibilities for its members</li> </ul>                     | 3<br>3      |            |       |
|                               | 4. Heritage bylaws are in place and enforced   | <ul style="list-style-type: none"> <li>• bylaws accurately reflect the current and anticipated future heritage needs of the community</li> </ul>  | 3           |            |       |
| <b>Research Requirements</b>  | 5. Ongoing research continues into local history and heritage  | <ul style="list-style-type: none"> <li>• information is accessible to all community members, and is actively promoted to schools, relevant businesses, and tourism/interpretive projects</li> </ul>                                 | 2           |            |       |
|                               | 6. A Heritage Inventory exists for the community   | <ul style="list-style-type: none"> <li>• the inventory is updated regularly (ex: bi-annually)</li> </ul>  | 3           |            |       |
| <b>Subtotal 1</b>             |  |   | 26          |            |       |

| Requirement       | Benchmark   | Desired Actions  | Point Value | Your Score | Notes |
|-------------------|---|--|-------------|------------|-------|
| <b>Financial</b>  | 7. A budget exists for the community's heritage activities        | <ul style="list-style-type: none"> <li>the budget is reviewed and updated annually</li> </ul>  | 3           |            |       |
|                   | 8. Financial sustainability for heritage activities is a priority | <ul style="list-style-type: none"> <li>fundraising events and activities are planned for each fiscal year</li> </ul>   | 3           |            |       |
|                   | 9. Partnership and sponsorship opportunities are sought           | <ul style="list-style-type: none"> <li>efforts are made to secure new partnerships, and to maintain positive relationships with existing partners</li> </ul>               | 3           |            |       |
|                   | 10. Government funding is secured                                 | <ul style="list-style-type: none"> <li>efforts are made to obtain government funding through assistance programs relevant to the community's planned activities</li> </ul> | 2           |            |       |
| <b>Planning</b>   | 11. Plans are in place for community heritage                     | <ul style="list-style-type: none"> <li>a Community Heritage Management Plan (CHMP) exists and has been created in a recommended format</li> </ul>                          | 4           |            |       |
|                   |   | <ul style="list-style-type: none"> <li>the CHMP is reviewed and updated annually</li> </ul>  | 4           |            |       |
|                   |   | <ul style="list-style-type: none"> <li>the development plan for the community/district contains detailed heritage policies</li> </ul>                                      | 3           |            |       |
| <b>Subtotal 2</b> |   |  | 22          |            |       |

| Requirement               | Benchmark   | Desired Actions  | Point Value      | Your Score | Notes |
|---------------------------|---|--|------------------|------------|-------|
| Conservation Requirements | 12. Conservation of Heritage Sites is a priority  | <ul style="list-style-type: none"> <li>• community recognition of significant sites and buildings, including designation of selected sites</li> <li>• community support is offered for maintaining sites (such as information, technical, or financial support)</li> <li>• interpretive or promotional materials exist for all appropriate sites</li> <li>• the local government has endorsed the Standards and Guidelines for the Conservation of Historic Places in Canada and promotes them to heritage site owners</li> </ul>                                      | 3<br>2<br>2<br>3 |            |       |
|                           | 13. Heritage sites proposed for designation are given thorough consideration prior to designation                     | <ul style="list-style-type: none"> <li>• heritage values of sites proposed for designation are understood and available prior to designation</li> <li>• viability of sites proposed for designation is considered prior to designation (such as planned use, condition and long-range maintenance)</li> <li>• expectation of each new designation is outlined to owners prior to designation: <ul style="list-style-type: none"> <li>• public access/owner privacy</li> <li>• community awareness</li> <li>• policy re: alterations to the site</li> </ul> </li> </ul> | 3<br>3<br>3      |            |       |
| Human Resources           | 14. All staff or volunteer positions related to the community's heritage committees, activities, or events are filled | <ul style="list-style-type: none"> <li>• job descriptions are in place for each key position</li> <li>• professional development and training opportunities are encouraged and supported</li> </ul>  | 2<br>1           |            |       |
| <b>Subtotal 3</b>         |   |  | 22               |            |       |

| Requirement                                  | Benchmark  | Desired Actions   | Point Value                               | Your Score | Notes |
|--|--|---|---|------------|-------|
| <b>Education/<br/>Interpretation</b>         | 15. Opportunities to learn about local heritage are available in community schools         | <ul style="list-style-type: none"> <li>• Historica Fair</li> <li>• Manitoba Day or other heritage event participation opportunities</li> <li>• partnerships between heritage groups and schools</li> </ul>  | 1<br>2<br>2                               |            |       |
|  | 16. Interpretive activities and media are in place highlighting local history and heritage | <ul style="list-style-type: none"> <li>• brochure</li> <li>• map</li> <li>• guided walk</li> <li>• signage</li> <li>• website</li> <li>• public programs and special events</li> <li>• museum</li> <li>• a budget exists for updating and implementing interpretive activities</li> <li>• inter-community and inter-municipality cooperation and partnerships exist for delivering interpretive activities</li> </ul> | 1<br>1<br>1<br>1<br>2<br>3<br>3<br>2<br>2 |            |       |
| <b>Economic<br/>Development/<br/>Tourism</b> | 17. Where appropriate, commercial use of heritage buildings and sites is encouraged        | <ul style="list-style-type: none"> <li>• appropriate commercial activity encouraged in heritage buildings/ sites</li> </ul>   | 2   |            |       |
|  | 18. Established heritage districts/ areas exist  | <ul style="list-style-type: none"> <li>• community recognizes streetscapes, neighbourhoods or landscapes as heritage districts/areas to boost their real/ perceived value</li> </ul>  | 2   |            |       |
|  | 19. Heritage and/or cultural tourism businesses exist in the community                     | <ul style="list-style-type: none"> <li>• related businesses and activities exist in the community</li> <li>• support and encouragement for activities and entrepreneurs is provided by the community in the form of knowledge, access to information, professional services or access to capital</li> </ul>   | 3<br>2                                    |            |       |
| <b>Subtotal 4</b>                            |  |   | 30  |            |       |

|                   | <b>Point Value</b> | <b>Your Score</b> |
|-------------------|--------------------|-------------------|
| <b>Subtotal 1</b> | 26                 |                   |
| <b>Subtotal 2</b> | 22                 |                   |
| <b>Subtotal 3</b> | 22                 |                   |
| <b>Subtotal 4</b> | 30                 |                   |
| <b>Total</b>      | 100                |                   |

Total number of Benchmarks = 19      Total points available = 100



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