

Sustainable Solutions for Leduc's Heritage Landscape



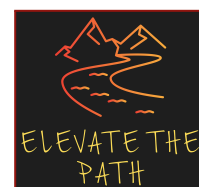
FINAL REPORT

January 8, 2025

EM Museum Consulting (EM)



Elevate the Path (ETP)



CONTENTS

PROJECT OVERVIEW.....	3
PROCESS.....	3
Community Engagement & Consultation.....	4
Research, Trends and Best Practices in Heritage.....	6
Operational Models and Cost Analysis.....	6
RECOMMENDATIONS & NEXT STEPS.....	8
Governance Recommendations.....	9
Strategic Positioning Recommendations.....	11
CONCLUSION.....	14
ACKNOWLEDGEMENTS.....	14

PROJECT OVERVIEW

Leduc's heritage sites, including Dr. Woods' House Museum, represent a connection to history and culture, drive economic growth, and help shape Leduc's identity. Heritage sites represent a physical connection to the past and they help community members and visitors understand the way Leduc was.

These spaces, however, face increasingly complex challenges, and Dr. Woods' House Museum is no exception. Escalating infrastructure and operating costs, patterns of declining volunteerism, urbanization, and more all contribute to the collective challenge of ensuring such spaces continue to thrive.

While Dr. Woods' House Museum benefits from a designation as a Municipal Historic Resource (2007), positive tourist reviews, and a substantial museum collection, finding sustainable strategies that align with community interests and City commitments is paramount.

Recognizing this, the City of Leduc invited identified the following goals for this project:

1. Understand heritage trends and best practices.
2. Gather community input on how to engage with heritage assets.
3. Explore operational models for Dr. Woods' House as a museum, including City-run, third-party, or adaptive reuse.
4. Provide cost estimates for different paths.
5. Recommend sustainable strategies that align with community needs and City goals.

EM Museum Consulting (Erin McDonald) and Elevate the Path (Maureen Parker and Ian Howatt) are pleased to deliver this final Recommendations Report that:

- Integrates key findings from the heritage trends analysis, operational model evaluation, and the community and partner engagement (Deliverables A, B and C)
- Aligns with a performance-based framework utilized to frame the research and public consultation (Aigwi et al., 2020)
- Provides clear, actionable recommendations that align with the City of Leduc's strategy and fiscal and operational realities.

PROCESS

EM Museum Consulting and Elevate the Path partnered to deliver the required research, engagement, operational models and cost analysis, and final recommendations to help the City of Leduc develop sustainable, community-focused strategies for the future of Dr. Woods' House and Leduc's broader heritage landscape.

To develop relevant and meaningful recommendations, a breadth of information was analyzed. The approach was guided by a performance-based framework developed by Aigwi et al. (2020), emphasizing a balanced evaluation of economic, social, regulatory, usability, and heritage preservation aspects.



Community Engagement & Consultation

Aligned with the mission of *People Building Community*, and the importance of initiating strategic planning efforts “with a comprehensive community engagement process that asks residents, stakeholders and staff for feedback on a variety of topics, and provides an opportunity to recommend new ideas,” (City of Leduc Strategic Plan 2023-26), Elevate the Path engaged with community and partners in November and December 2024. Perspectives and feedback on Dr. Woods’ House Museum and other heritage assets in Leduc were gathered from the following partner and community organizations during this period:






- Heritage Groups (two sessions)
- Leduc Community (two sessions)
- Relevant Agencies, Boards, and Commissions of Council (one session)
- Leduc City Council (individual consultations)
- City of Leduc Staff (one session, two interviews)

All group engagement sessions and Council consultations were in-person, with one staff consultation held virtually. Noting that community aspirations for the future of Dr. Woods’ House Museum and other heritage spaces in Leduc are key drivers for future strategic planning, input was gathered on operational models, funding, community engagement strategies, and sustainable heritage asset management. Importantly, this exercise also fostered greater understanding and a commitment to further collaboration across different sites and groups within the community. Deliverable B - *What We Heard Engagement and Consultation Report* - summarizes the findings from partner and public engagement contributing to the development of recommendations for the future of Leduc’s Dr. Woods’ House Museum and other heritage assets.

Over the course of these engagement sessions, participants highlighted:

- How they desire to engage with Leduc’s heritage assets
- Their ideas about the future of Dr. Woods’ House museum, and
- Sustainable solutions for built heritage asset management

resulting in the following key themes:

				
<p>Consolidate heritage management</p>	<p>Diversify programming</p>	<p>Enhance heritage promotion</p>	<p>Expand funding sources</p>	<p>Build a strategic path for heritage</p>
<p>Form an umbrella organization (i.e. board, trust, committee, etc.) to oversee Dr. Woods' House Museum and other heritage assets in Leduc, and to explore a regional approach to heritage.</p> <p>Activate a combination of paid and volunteer positions to coordinate heritage-related activity, with the City of Leduc as a key partner.</p>	<p>Diversify programming at Dr. Woods' House Museum and other heritage sites to cultivate interest and increase site utilization.</p> <p>Examples include: hosting events, speakers, space rentals, educational programming, rotating exhibits, utilizing the outdoor spaces at heritage sites, digital and virtual engagement tactics, satellite museum exhibits, and more.</p>	<p>Develop and implement promotional strategies to raise the profile of heritage and draw visitors to the sites.</p> <p>Ideas include: using social media, increased heritage site identification via Google, improved signage, and tying heritage promotion to major events in Leduc (i.e. community events, sporting events, celebrations, etc.).</p>	<p>Explore opportunities to broaden funding through grants, memberships, partnerships, sponsorships, donations, legacy gifts, and more.</p> <p>Participants noted the need to structure heritage oversight and management in ways that ensure access to an array of funding streams and potential grant dollars.</p>	<p>With community, and in alignment with the City of Leduc's strategic direction, build a five to ten year vision and business plan for Leduc's heritage.</p> <p>Ensure that it focuses on shared purpose, impactful collaboration, and well-designed operating models.</p> <p>Along with this, explore and create opportunities for regional collaboration and alignment.</p>

Source: *What We Heard Engagement & Consultation Report (Deliverable B, Elevate the Path, 2024)*

Research, Trends and Best Practices in Heritage

Heritage sites are vital cultural, educational, and economic assets, preserving historical narratives while fostering a sense of community identity. Maintaining their relevance and functionality amidst a rapidly evolving environment, however, requires innovative management strategies. This first report - *Heritage Trends and Benchmarking Report* (Deliverable A) - includes a comprehensive analysis of current trends in heritage management, particularly in municipalities with characteristics or heritage assets similar to Leduc. EM Museum Consulting, the project lead, conducted detailed research to benchmark Dr. Woods' House Museum against similar heritage sites across Alberta and Canada. The analysis examined operational models, funding mechanisms, community engagement strategies, and best practices for sustainable heritage asset management.

Instrumental in this work was development and implementation of a Survey of Central Alberta Regional Museums Network (CARMN) Adaptive Reuse Practices. While not part of the original scope, this input provided valuable, transformational perspectives on the community engagement practices, site operations, and preservation mechanisms used across similar museums in Alberta.

Research, Trends & Best Practices: Key Findings for Dr. Woods' House Museum				
Economic Sustainability:	Heritage Preservation:	Community Engagement:	Accessibility and Usability:	Public Funding as a Core Revenue Stream:
Opportunities exist to diversify revenue streams to enhance financial resilience.	Pursuing Provincial Historic Resource (PHR) designation could unlock additional funding for conservation efforts.	Strengthening local partnerships can expand programming and visitor reach.	Enhancing physical accessibility and leveraging outdoor spaces can broaden community use.	Most sites rely heavily on municipal or provincial grants, often supplemented by admission fees or programming income.

Source: *Research, Trends & Best Practices Report* (Deliverable A, EM Museum Consulting, 2024)

Operational Models and Cost Analysis

Building on the insights from Deliverable A (EM Museum Consulting 2024) and incorporating extensive public and stakeholder consultations in Deliverable B (Elevate the Path 2024), the third report - Deliverable C, *Operational Models and Cost Analysis* - examines sustainable heritage models for the City of Leduc and makes recommendations for application to Dr. Woods' House Museum and additional heritage assets.

Specifically, EM Museum Consulting evaluated five models:

Option 1	Option 2	Option 3	Option 4	Option 5
Municipal Oversight Model	Third-Party Not for Profit Operational Model	Third-Party For Profit Operational Model	Hybrid Option 1: Municipal - Contractor Partnership	Hybrid Option 2: Unified Heritage Operator
Full ownership and management by the City of Leduc.	Management by a not-for-profit organization, potentially supported by grants and volunteer efforts.	Management by a for-profit entity aiming to integrate commercial ventures.	Municipality retains oversight but contracts programming and events to third-party organizations.	Third-party leads operations with municipal funding and guidance for strategic goals.

Adapted from Deliverable C: Operational Model Analysis Report, 2024; Section 2, Table 1

This analysis incorporated input and insights from stakeholders and the community, and with financial and operational information for Dr. Woods’ House Museum. The *Operational Model Analysis Report for Dr. Woods’ House Museum* (DWHM) comprehensively evaluates these five operational models, integrating feasibility scoring, weighted evaluation methodologies, risk assessment, and strategic alignment with the City of Leduc’s cultural and fiscal priorities. This final report informs sustainable decision-making through detailed analyses and insights highlighting each model’s strengths and challenges.

The final scoring (Table 3 from *Operational Model Analysis Report*) provides a comparative evaluation of all operational models. Each model’s strengths and weaknesses are analyzed to highlight its relative suitability for Dr. Woods’ House Museum.

As is evidenced, **Hybrid Model 2: Unified Heritage Operator emerges as the strongest option**, with the highest feasibility score (4.90) and the highest top-weighted evaluation score (4.05). It also excels in financial stability and scalability with the potential for governance simplicity.

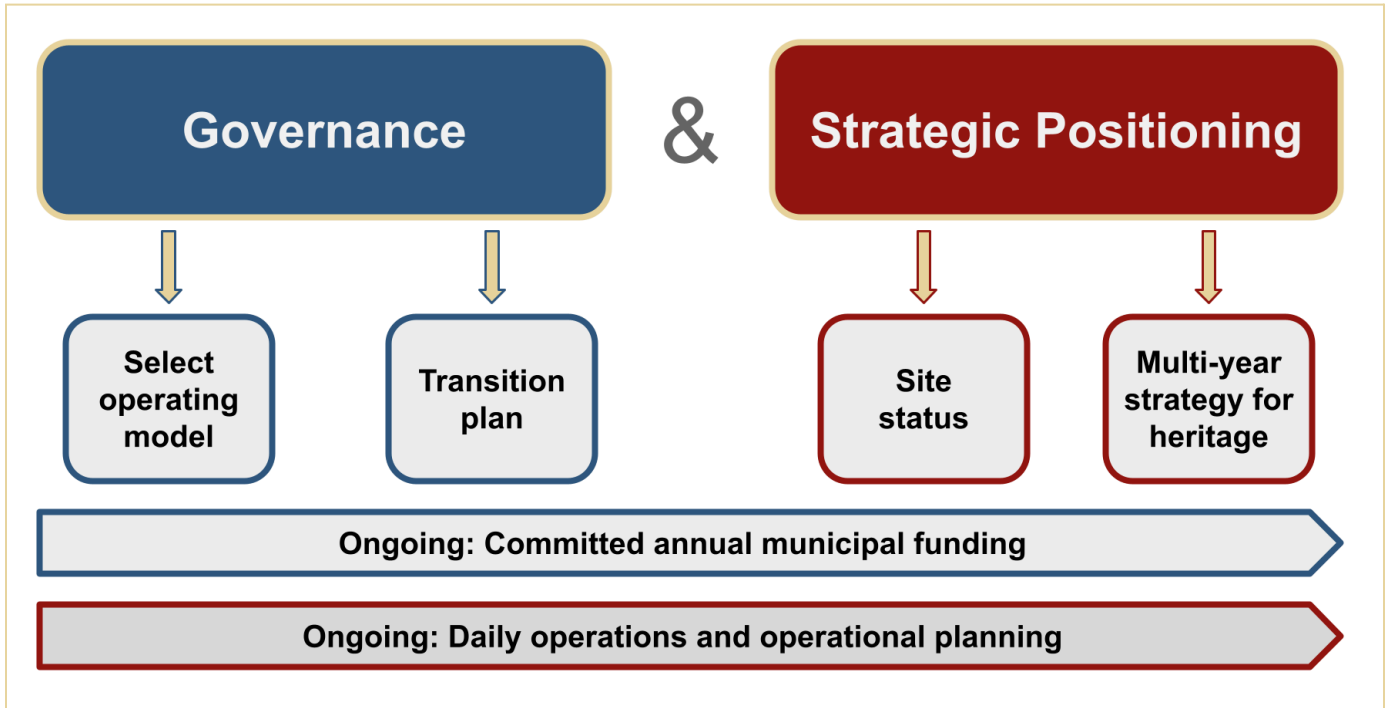
Combined Score by Operating Model

Operating Model	Total Weighted Score	Total Feasibility Score	Total Combined Score
Municipal Oversight Model	3.10	3.90	7.0
Third-Party NFP Model	2.30	2.80	5.1
Third-Party For-Profit Model	3.46	3.80	7.25
Hybrid Model 1: Municipal-Contractor Partnership	3.83	4.40	8.23
Hybrid Model 2: Unified Heritage Operator	4.05	4.90	8.95

Source: Developed for Deliverable D from (Aigwi et al. 2020; City of Leduc 2021; Elevate the Path 2024; EM Museum Consulting 2024a, 2024b; Vafaie, Remøy & Gruis 2023)

RECOMMENDATIONS & NEXT STEPS

EM Museum Consulting and Elevate the Path have identified six recommendations across two central themes: Governance and Strategic Positioning.



Governance Recommendations

Select an operating model Lead: City of Leduc	Build a transition plan Lead: City of Leduc	Ensure committed annual funding Lead: City of Leduc
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ACTION: Determine the most desirable and beneficial operating model, build the coalition to transition towards it, and ensure sustainable operating funding throughout.

Recommendation	Explanation
<p>Select the Operating Model</p> <p><u>Recommendation:</u></p> <p>Establish a Unified Heritage Operator</p> <p>To do this, consider creating a Part 9 Company to oversee and manage all current and future heritage spaces in Leduc</p> <p>Governance Options for Municipal Regional Services in Alberta</p>	<p>In reviewing Deliverable C - the <i>Operational Model Analysis Report</i> - the City of Leduc and City Council will need to determine the preferred operating model for Dr. Woods' House Museum and other heritage assets.</p> <p>The consultants recommend exploring Hybrid Model 2, creating a Part 9 company as a unified heritage operator.</p> <p>As defined by the Government of Alberta, a Part 9 company operates as a non-profit organization incorporated under the Alberta Companies Act. They are formed to promote activities like art, science, religion, charity, or recreation.</p> <p>The following rules govern part 9 companies:</p> <ul style="list-style-type: none"> ● Profits: Profits must be used to promote the company's objectives, and no dividends can be paid to members ● Loans: Part 9 companies can borrow funds to carry out their objectives, but they are not eligible for direct loans from the Alberta Capital Finance Authority ● Legal entity: A Part 9 company is an independent legal entity that is separate from its members or owners ● Assets: A Part 9 company can buy, sell, and own assets, including land ● Contracts: A Part 9 company can enter into contracts ● Lawsuits: A Part 9 company can sue and be sued

	<p>Rationale for Unified Heritage Operator:</p> <ul style="list-style-type: none"> • The Hybrid Model 2: Unified Heritage Operator demonstrates the highest feasibility score (4.90), offering a centralized approach that balances financial sustainability, scalability, and strategic alignment. • This model maximizes resource efficiency across heritage sites, reducing duplication while fostering innovation in programming and community engagement. • Further, it was an option offered through the consultation phase as aligning with both municipal and community values.
<p>Build a Transition Plan</p> <p>As per 6.3.2 in Deliverable C (Operational Model Analysis Report), undertake the following steps to implement the chosen operational model effectively:</p> <ol style="list-style-type: none"> 1. Build a roadmap 2. Engage with critical partners 3. Undertake financial planning 4. Pilot new programming 5. Develop a monitoring and evaluation framework 6. Continue to adapt to sector trends 	<p>1. Build a Roadmap for the Transition</p> <p>A clear roadmap will smooth the transition to the new operational model. This plan should outline specific milestones, timelines, and required resources for implementation.</p> <p>2. Stakeholder/Partner Engagement</p> <p>Additional engagement will solidify community and partner alignment with the selected operational model. These discussions should include roles, responsibilities, and collaborative opportunities.</p> <p>The following groups are critical partners with whom to build directional alignment and momentum:</p> <ul style="list-style-type: none"> • Dr. Woods’ House Museum (City of Leduc Municipal Historic Resource) • Stone Barn & Cultural Village (City of Leduc Municipal Historic Resource) • Canadian Energy Museum (City of Leduc Municipal Historic Resource) • Leduc Heritage Grain Elevator (Alberta Legacy Development Society) • Other historical sites of interest: Leduc Crash Site, buildings on Main Street, etc. • Relevant other business and community organizations (i.e. Chamber of Commerce) <p>The consultants also suggest engaging with regional partners, as these actions were identified in the Engagement and Consultation process, and are aligned with the City of Leduc’s Strategy.</p> <p>3. Undertake Financial Planning</p> <p>Creating a five-year financial plan will address:</p> <ul style="list-style-type: none"> • Funding diversification (e.g., grants, municipal financial commitments, partnerships).

	<ul style="list-style-type: none"> • Budgetary contingencies for revenue shortfalls or cost escalations. • Long-term staffing and operational costs. <p>4. Pilot New Programming</p> <p>Testing new programming initiatives or revenue-generation strategies should help ascertain community interest and scalability. Insights from these pilots can then inform the full rollout of the operating model and be incorporated into the longer-term Operational Plan (below).</p> <p>Examples of diversified programming suggested by community and partners are in the <i>What We Heard Report</i> (Deliverable B, Elevate the Path, 2024).</p> <p>5. Monitoring and Evaluation Framework</p> <p>Developing a framework to monitor and evaluate the performance of the initial Transition Plan (and subsequent Operational Plan) will help for on-time adjustments, community and partner collaboration, and allow for insights into programming. Key performance indicators (KPIs) could include:</p> <ul style="list-style-type: none"> • Visitor attendance and programming participation • Financial targets and results • Community satisfaction and feedback <p>6. Adapting to Sector Trends</p> <p>Regularly reviewing trends and best practices from sector organizations such as CARMN, Alberta Museums Association, and Canadian Museums Association will help align Leduc’s heritage landscape with emerging innovations in heritage management.</p>
<p>Committed annual municipal funding</p> <p>Ensure municipal operating and capital funding</p> <p>Cost estimate: \$115,000 - \$165,000 annually (Deliverable C)</p>	<p>The Central Alberta Regional Museums Network (CARMN) survey data identified that most heritage sites rely heavily on municipal or provincial funding as a core revenue stream (EM Museum Consulting, 2024).</p> <p>Ongoing municipal support of approximately \$115K-\$165K per year will help ensure Dr. Woods’ House Museum, and Leduc’s broader heritage landscape, are sustained through intentional investment. This investment can be supplemented over the longer-term through new approaches to funding (i.e. partnerships, sponsorships, admission fees, programming incomes, etc.),</p> <p>Annual funding will support:</p> <ul style="list-style-type: none"> • establishment and stabilization of the selected operating model • plan development (i.e. transition, strategic, operational) • program development and diversification • community engagement • infrastructure improvements to increase accessibility and meet fire safety upgrade requirements • ongoing documentation of archives.

Strategic Positioning Recommendations

Advance site status Lead: Chosen operator	Build a multi-year strategy for heritage Lead: Chosen operator	Continue operations and operational planning Lead: City of Leduc in partnership with chosen operator
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Intention: Pursue historic designation status for the Museum and develop a five-year strategic plan for all of Leduc’s heritage assets, while maintaining daily operations and conducting operational planning.

Recommendation	Explanation
<p>Site Status</p> <p>To bolster conservation efforts, consider pursuing Provincial Historic Resource (PHR) designation for Dr. Woods’ House Museum, which provides access to specialized funding and grants.</p>	<p>Take a phased approach to pursuing a Provincial Historical Resource (PHR) designation.</p> <p>Suggested steps:</p> <ol style="list-style-type: none"> 1. Begin with seeking Alberta Museums Association Recognized Museum Status for Dr. Woods’ House Museum. Grants are available to assist with pursuing this status (i.e. applying for an institutional grant for the development of a collection management policy). <p>EM Museum Consulting suggests contacting Joanne Gruenberg, Program Lead for the Recognized Museum Program at the Alberta Museums Association (780.424.2626).</p> <p>If this status is obtained, access opens to a number of other operating and capital grants.</p> <ol style="list-style-type: none"> 2. Following this, the selected Operator could then work to obtain PHR status, if desired, or, minimally, retain Municipal Historic Resource Status for Dr. Woods’ House Museum. <p>Of note, a Provincial Historic Resource (PHR) requires written approval from the Minister to be destroyed, disturbed, altered, restored, repaired, removed. Source: https://www.alberta.ca/designation-provincial-historic-resources</p>

<p>Multi-Year Strategy for Leduc Heritage</p> <p>Develop a five-year strategic plan for Leduc's heritage landscape</p>	<p>A strategic plan articulating a desired future state for all heritage assets in Leduc will help ensure unification around a common purpose, foster greater collaboration among partners, and define needed direction to ensure sustainability of the spaces.</p> <p>Focus areas</p> <p>This plan should focus on key themes from the reports to design and develop long-term, sustainable practices and processes for:</p> <ul style="list-style-type: none"> ● Community engagement and involvement ● Promotion and marketing of Leduc's heritage ● Future financing and funding sources for heritage ● Key partnerships ● Regional collaboration ● Staffing and volunteer management ● Collections Mandate and collections management, followed by a curatorial and exhibits process ● Programming diversification for heritage assets <p>Each theme should further detail the strategy or plan to activate desired outcomes. By way of example, the theme around key partnerships, for instance, should answer such questions as:</p> <ul style="list-style-type: none"> ● Which partners - within the local, business, and regional community - are needed to sustain, connect and elevate heritage in Leduc? ● Why are such partnerships so important for success? ● How will partners work together for common goals? ● How will partner accountability be defined? ● How should the partners be engaged? ● Who will coordinate and manage the partnerships? <p>This work is imperative as it sets intentional direction for the critical components required for the sustainability of Dr. Woods' House Museum and Leduc's heritage landscape.</p>
<p>Operational Plan for Dr. Woods' House Museum</p> <p>Develop a three-year operational plan for Dr. Woods' House Museum</p>	<p>As noted through the research, operational analysis, and public engagement, Dr. Woods' House Museum has a number of strengths, including community support. To ensure the sustainability of the site, a number of operational details must be managed and formalized.</p> <p>As such, development of a three-year operational plan for Dr. Woods' House Museum is recommended to build on and mature the Transition Plan identified above.</p> <p>This operational plan should prioritize ongoing management, utilization, space, and programming challenges, with emphasis given to:</p>

	<ul style="list-style-type: none">● Facility improvements to ensure the Museum meets accessibility and fire safety code requirements● Ongoing documentation of artifacts● Staffing to meet operational requirements● Space utilization, including better use of the outdoor space around the Museum● Enhanced and more diverse programming reflecting community and partner feedback● Annual operating and capital budget requirements to adequately fund needed enhancements <p>This plan should also highlight time horizons for the work required and accountabilities.</p> <p>Note: The <i>Operating Model Analysis Report</i> (Deliverable C) identifies estimated costs, staffing needs, and risk assessments to realize this operational plan.</p>
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CONCLUSION

EM Museum Consulting and Elevate the Path recommend a phased approach to the recommendations, over a **timeline of 14-18 months**, depending on decisions and resource commitments.

ACKNOWLEDGEMENTS

EM Museum Consulting and Elevate the Path appreciate all participants' generosity of time and perspectives, and the City of Leduc for advancing this important community-building work.